

# *The Nathan Cummings Foundation*



*2009 Annual Report*

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## *Message from the Chair*

Here in North America and globally, 2009 marked the continuation of an era of dynamic disequilibrium. In the United States, manifestations of this state of affairs were hard to miss:

- Airline pilot Chesley B. “Sully” Sullenberger’s successful crash landing on the Hudson;
- Barack Obama’s inauguration as the nation’s first African-American president;
- the collapse of the climate talks in Copenhagen;
- the elevation of Sonia Sotomayor to the United States Supreme Court; and
- the man-made avalanche of damage, misery and injustice set off by the deepest economic downturn since the Great Depression.

All of these developments, some positive and others corrosive, should only stiffen the backbone of people, institutions and movements committed to justice in all its dimensions -- social, economic and ecological -- here at home and overseas. So it is within this context that I am pleased to present this annual report. It provides a synopsis of the Nathan Cummings Foundation’s aspirations and accomplishments, and the accomplishments of our grantees, during the calendar year of 2009.

On behalf of the Board of Trustees of the Nathan Cummings Foundation, I would like to thank NCF’s indefatigable president, Lance Lindblom, for his courage, intellect and great good judgment. As a board, we would also like to convey our deep gratitude to this family foundation’s hard-charging staff. We continue to be amazed by the ability of the staff to deploy its intellectual capital in ways that fortify and elevate the commitment of the extended Cummings family to *tikkun olam*.

Ernest Tollerson  
Chair, Board of Trustees  
The Nathan Cummings Foundation

## *President's Report*

2009 was one of those years—creating almost every possible type of challenge to a Foundation that there is: programmatic, financial, administrative, public controversy, and most of all—human. NCF rose to all these challenges, and although we came through financially diminished—we were right on course with our programmatic efforts. As the following pages demonstrate, our programmatic efforts were key to almost every big issue facing the country: access to health care; energy policy and climate change, and through the stimulus program, the beginnings of a transition to a green economy; Middle East peace efforts; arts as a key to social justice; and corporate accountability.

The economic crisis gave added impetus to our social and economic justice mission. Many of our programmatic efforts have been real successes—but with all too much left to be done. The high expectations of a new Administration were diminished by the polarizing antics of self-interested groups, who put their own selfish desires ahead of the well being of all. Obstructionism, and the influence of monied interests did much to muddy the waters of what needs to be done, and undermined efforts to do it. Necessary actions to actually and effectively deal with the challenges we face were often completely compromised or watered down, partially sabotaging what we need to accomplish.

The future will hold us to a stiff account for any inability to deal with the real challenges we face. Our stewardship of the economy, country, and environment is being severely tested—and there is an open question as to whether we will rise to the occasion.

NCF has given many of us—Board, Associates, staff, and grantees—the ability to engage in this struggle. It is an incredible privilege to work with a supportive Board who is not afraid to take real risks, and a dedicated and diligent staff that has worked with diminished resources, to accomplish major advancements for social justice in incredibly difficult times. Most of all, it has been an inspiration to work with our grantee partners in a just quest to fulfill our hopes, rather than succumb to our fears.

Lance E. Lindblom  
President and CEO, Trustee  
The Nathan Cummings Foundation

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Interns

During the past year, the following staff left the Foundation. We would like to thank them for their contributions to our work: Victoria L. Miller, Special Assistant to the President, and Radha Blank, Program Assistant and Exhibit Coordinator for the Arts and Culture Program.

# *Arts and Culture Program*

## *2009*

### **INTRODUCTION**

**Building the Field of Art and Social Justice** - During the early Fall of 2008, the Arts and Culture Program asked twenty-two of its key arts and social justice grantees to participate in an online survey so that we might learn more about their missions and values, and how they implemented their goals. We asked with whom they collaborated, how they shared resources, and what their greatest challenges were. They described their work as: building communities, encouraging activism, creating leaders, amplifying ideas, generating interest, enabling individuals to tell their own stories, creating meaningful partnerships, sharing knowledge, expanding resources, raising visibility, and fostering social and cultural change. In accomplishing these tasks, they are utilizing a variety of art disciplines including dance, theater, media making, music, and visual arts. All of them were interested in exploring how to take small projects to scale, how to make good work great and how to get the word out so that others could benefit from their experiences and expertise.

In November of 2008, one week after the election, forty-four NCF grantees met in New York City to engage in a peer learning process that led to partnerships, consultancies, and new strategic relationships. One of the high points of this meeting involved the presentation of communications strategies. The participants learned about viral marketing, organizing on-line, games for change, interactive web sites, streamed media, animation using avatars in Second Life, collecting oral histories using Skype, and new uses of old media such as effectively harnessing the power of radio. After this meeting a number of youth development and media grantees met with members of the new administration. Many credit the Foundation with providing them with an opportunity to collectively develop responses to the government's stimulus program.

The Nathan Cummings Foundation's Art and Social Justice Program began implementing its revised guidelines in the midst of a national financial crisis. Leadership changes at many of the foundations with which we partner have led to new visions and modified strategies. Many of the Foundation's past grantees lost support from key funders and have struggled to find new supporters to fill those gaps. Programs that were affiliated with Universities were either down-sized or closed as institutions of higher education focused on core course offerings. The entire field made adjustments as their individual donors, as well as their private and public funders regrouped so that they could function effectively with less.

Arts and Culture grantees have laid-off staff, instituted furloughs, offered buyouts and implemented cuts in salary. On a more positive note, they have shared resources, planned events together, merged some components of their operations, shared office space and staff. Several have exhibited true leadership during these difficult times, by reorganizing and streamlining their operations instead of expecting fewer staff members to do more work with less money. These leaders have reviewed their strategic positions and have discontinued offering services or programs that others might be able to deliver more effectively to the same constituency. Leaders have also understood the possibility of staff burnout and have created supportive work



environments for overburdened staff. Flexibility, in the face of demanding situations has opened the door for new and innovative ideas that have enabled groups to save money and time, while acknowledging the expertise of dedicated staff.

In the current economy, the Arts and Culture Program's strategy has chosen to stabilize grantees whose missions and values are squarely aligned with our arts and social justice guidelines. We have invited a small number of new grantees whose projects are innovative and future focused. Many of these projects are using social networking tools to accomplish broad based change. NCF grantee programs have served as models for foundations that are considering developing art and social justice guidelines.

### **Objective 1- The Arts**

**To support community-based artistic and cultural project that illuminate social and economic justice issues.**

In the current economy, we are strategically looking at how to leverage support for the nonprofit sector. Brokering relationships is an important component of our work. **Public Design Studio's** *The 1% Program: Strengthening Nonprofits Through Design* project, (with Ecological Innovation and Collaborative Initiatives) catalogues nonprofit requests for design services and connects them to firms willing to respond to their design problems. The program is currently working with more than 600 architectural and design firms and 250 nonprofits across the country. The **Smithsonian Institution's** *Cooper Hewitt, National Design Museum: "A City of Neighborhoods"* uses urban planning and design to empower students to develop and sustain their investments in their communities as they work with local leaders and community members for positive change. The **Friends of the Highline, Inc.** (a Presidential Authority Grant with Ecological Innovation and Collaborative Initiatives) has created an extraordinary public park that re-purposes an industrial infrastructure as an urban ecological amenity. Our support will focus on the creation of new, green jobs on the High Line, new public art, and efforts to engage and to hire from the surrounding community, including the large public housing projects in the neighborhood.

**The Cloud Institute for Sustainable Design** (with Collaborative Initiatives and Ecological Innovations) uses Peter Senghe's principles concerning "schools that learn," and works with educators and schools that teach sustainable design in ten cities. The **Lincoln Park Coast Cultural District** (LPCCD) (with Ecological Innovations) is an example of civic engagement in action. LPCCD is creating an urban eco village that combines smart growth, arts and culture, green jobs, open space preservation and US Green Building Council (USGBC) LEED certified affordable housing. The cultural component of this effort has included open-air concerts and special events that have educated the public about green communities.

We have sought to galvanize communities to act in their own best interest by highlighting personal stories of triumph and challenge and connecting those stories to public policy issues that help us better understand the importance and power of diverse voices. The **Backbone Campaign** creates art, and teaches others to use art to explore social justice issues. Backbone's *Procession for the Future 2010 Tour* (with Ecological Innovation and Collaborative Initiatives) is a nationwide tour of the United States that uses creative tools to give voice to citizen aspirations and provides them with an opportunity to participate in social actions for peace, human dignity

and environmental sustainability. Backbone will train approximately 700 individuals in Art and Social Change workshops on campuses and at community-based institutions.

Several of our grantees use performing arts and citizen engagement skills to explore social issues. **Aaron Davis Hall/Harlem Stage** employs a community engagement process to develop new performance works that address social issues; and **MAPP International** has codified that civic engagement process so that performing arts centers across the country can develop work that reflects the experiences and values of their publics. The **Young People's Project's** *Finding Our Folk* program (with Collaborative Initiatives) originated in New Orleans post-Katrina. The Hot 8 Band and facilitators educate, perform and build relationships with service organizations in cities that host families displaced by hurricane Katrina.

The **Oregon Shakespeare Festival Theatre** project, Nexthetics enables Hip Hop spoken word artists to examine social issues in the works of Shakespeare and create contemporary new works; and **Youth Speaks**, a group that pioneered spoken word competitions, supports exemplary groups across the country. **Cornerstone Theater Company, Inc.'s** *The Justice Cycle Bridge Show*, is a community based performance which incorporates ideas from five previous Justice Cycle plays: "Los Illegals," on issues of immigration and documentation, "Someday," a play about reproductive rights, "For All Time," which examines the criminal justice system and "Touch The Water," an environmental justice play. There will be six community performances of the "Bridge Show." Their training program, the Cornerstone Institute, is an in-depth experiential education program focused on community-based theater that includes students, community residents, activists and theater professionals.

Several of our grantees are using the Internet and other online formats to reach broader constituencies. The **American Poetry Museum** has created and manages a database and website that documents commercial and independent rap and spoken word art that reference social justice issues. Curriculum and education programs have been developed from the database content. **Global Kids, Inc.** teaches youth to develop "Games for Change," and has created a hub that will help educators navigate the virtual world. **The Center for American Progress** (with Collaborative Initiatives) programs film to illuminate social issues at its annual campus convention, national outreach events and local programs. The **Bay Area Video's** project *Through a Lens Darkly* includes a documentary film and a participatory digital archive that allows families to submit and cross-reference photos about shared histories.

We continue to support art exhibitions that provide our local and national public with information about timely social issues as seen through the lens of individual artists. **The Bronx Arts Council's** exhibition *Other, Other...High Visibility*, explored the works of artists whose works addressed issues of identity; and the **Provisions Learning Project**, developed the exhibition, *Close Encounters: Facing the Future*, an exhibition that asked difficult questions about the state of the world. This exhibition had several venues including the Nathan Cummings Foundation. The **Creative Capital Foundation** works with visual and media artists who are doing path-breaking work, mentoring them at a retreat that includes fiscal planners and marketers. A PAG was made to **American Indian Arts, Inc.** for *Relevant: Reflection-Reformation-Revival*, an exhibition that featured works by Native American artists living and working in New York City. All of the artists in this exhibition work outside of the conventions

found and supported within the Santa Fe art market. They challenge modern concepts of what Native art is supposed to look like and debunk the romanticized myths of the Native peoples while revealing that Native artists concurrently reside in more than one world.

**The New York Foundation for the Arts, Inc./Active Citizen Project** (with Collaborative Initiatives) encourages the disenfranchised to weigh in on social issues using media and graphic arts. **Terra Moto** employs local artists who work with city workers who tell their stories in many different media (a police poetry calendar, coffee cups with wood block print images and biographies, collages that are exhibited) and in doing so; they support and reflect the values of the diverse citizens in their communities. All of these projects help citizens state their cases effectively using compelling images and text.

## **Objective 2: The Practice**

**To support convenings and training programs for artists, cultural workers and community members that impart information and skills that can be used to achieve social change.**

Using culture to build communities calls for skills that go beyond good deeds and “missionary” work. Cultural workers who engage in community building acknowledge that they must be learners as well as teachers; listeners as well as speakers; and followers as well as leaders. The **Allied Media Project’s** *Allied 365 Training Exchange Bureau* (PAG) convened a hands-on Media Lab at the organization's 2009 conference. At the Media Lab, young people led participants in media making workshops in animation, music production, digital editing, graphic design, stencil making and photography.

Our grantees learn new skills and train others in the field at formal conferences, training workshops and affinity convenings. Two national service organizations that have advanced the field of art and social justice are the **Theatre Communications Group** (TCG), and the **National Performance Network, Inc.** (NPN) (with Collaborative Initiatives). TCG has diversified its participants by providing scholarships to younger theater professional as well as participants of color. NPN reaches and serves performing artists in rural, suburban, and urban communities that the Foundation might not normally reach. Both organizations advocate for community-building practices and have featured our grantees as speakers and panelists.

**The Research Foundation of City University of New York/Medgar Evers Center for Black Literature** implemented a literary and visual arts program on transformative art that included nationally recognized and local artists. **1+1+1=ONE** creates performances and has developed a leadership project that examines key social issues identified by young women between the ages of 17 and 35. The **University of Massachusetts Foundation, Inc.’s** *Intersection VI* conference was postponed due to a reconsideration of institutional priorities. A study is currently under way.

**Just Vision** and **Auburn Theological Seminary** (both with Jewish Life and Values) employs many of the same strategies as our arts grantees in elevating the practices of the field. Just Vision distributes DVDs and curriculum to teachers, students, community leaders, and journalists throughout North America, produces short films about structural approaches to conflict resolution for online and community use and conducts classroom and community workshops, facilitator trainings and conference presentations. The Auburn Media Project promotes

responsible and engaging religious voices through media by implementing a Journalist Resource Desk, media training, productions, documentary outreach campaigns, and consultations that provide media expertise to religious communities and religious expertise to the media.

Two of our grantees have growing constituencies as they work to build communities of arts and social justice practitioners. **The League of Young Voters'** *Tunnel Builders Institute* trains people of all ages throughout the country on community building strategies that incorporate the arts; and the **Regional Cultural Performing Arts Development Commission** hosted *The Community Arts Training Institute and Practitioners Conference*, the first gathering of arts and social justice practitioners in the mid-West. Participants shared methodologies, case studies and resources.

**Junebug Productions, Inc.**'s *Free Southern Theater Institute* (FSTI), (with Collaborative Initiatives) is an effort to institutionalize its practice. Its work includes educational programs and a community-centered cultural laboratory for the creation of new theater works based on real life experiences. It also disseminates tools for using theater to affect social change, and create public value. The FSTI curriculum includes training in Community Engagement, Theater Education, and Presenting and Producing. The *Liberating Voices/Liberating Minds & Media Arts Program* of the **Brotherhood/Sister Sol, Inc.**, is a community-based model program that teaches youth to become critical thinkers by providing a comprehensive social justice curriculum. The curriculum allows participants to develop an awareness of social justice issues and their effect on their communities. Participating youth speak at national conferences, as well as at the BHSS training institute for educators who are learning how to help young people become active and articulate social change makers.

While some of our grantees teach artists, cultural workers, students and community members how to use artistic media to tell their own stories effectively, others help contextualize historic events so that we can better understand contemporary issues. The **International Coalition of Historic Site Museums of Conscience** (with Jewish Life and Values and Collaborative Initiatives) *Sites of Conscience: U.S. Initiative*, supports coordinated national responses to key contemporary social justice issues identified as urgent in communities. The Coalition is working on three major projects in the U.S., the Immigration Sites of Conscience Network, the American Indian Boarding School Sites of Conscience Project and the Guantanamo Public Memory Project. The Coalition develops Dialogue programs at historic sites, designs traveling exhibitions and web projects, and engages in peer-to-peer training programs.

The **Grantmakers in the Arts** *GIA 2009 Annual Conference: Navigating the Art of Change* (PAG) was an ideal venue for convening and providing peer learning opportunities for funders concerned with Art and Social Justice. At the 2009 conference, the Art and Social Justice Funders working group hosted its second pre-conference which addressed methods for assessing the impact of art and social justice projects; new technology to advance social justice issues; art and gentrification in Williamsburg; the Pedagogy of Hip Hop Art; International Art and Social Justice Projects; and Art and Creative Stimulus and Economic Recovery. In addition to supporting the annual meeting, we are also a member of Grantmakers in the Arts.

### **Objective 3: Communications**

**To support diverse media and innovative delivery systems that document and disseminate the work of the field.**

The Arts and Culture Program is open to exploring innovative communications models that enable the public to be active participants in cultural action projects. **Appalshop's** *A Thousand Kites* project creates film, radio programming and theater that convey the stories of urban prisoners incarcerated in the South; their families, their guards and the local community. **Let's Breakthrough Inc.** has created interactive and participatory web-based tools that explore social issues in immigrant communities

**Yale University's** *Journey of the Universe*, (with Ecological Innovations) is a film that speaks to those who are interested in how scientific insights can help create societies capable of addressing major social and ecological issues. The film will be complemented by an educational DVD series, illustrated book, teaching materials and website. Additionally, the **Center for Rural Strategies** (with Collaborative Initiatives) produces *The Daily Yonder* a website for rural news that documents cultural, political and social issues in rural, Native and immigrant communities; and **The Main Street Project** uses WEB 2.0 to help rural residents build communities by telling their stories and sharing cultural practices and social concerns.

The overarching policy issue that is having an impact on all of our program areas is the state of the economy. **WGBH/Frontline** (with Collaborative Initiatives, Jewish Life and Values, Health, and Ecological Innovations) has developed a series of programs that will educate the public about the deregulation of the financial industry and how it led to our current fiscal crises. *Breaking the Bank*, will address the recent bank bailout.

**The Scribe Video Center, Inc.** (with Collaborative Initiatives) in Philadelphia's work to increase community-based organizations' capacity to use media as an educational, advocacy and cultural tool is a national model program. Scribe cultivates youth media makers who produce aesthetically sophisticated, high-impact media. The **League of Young Voters Education Fund's** (with Collaborative Initiatives) *Citizen Engagement Laboratory* develops digital media and technology to amplify the voices of under-served groups, particularly communities of color and young people. The Lab produces hard-hitting, short format videos that can be used by NGOs that may not have in-house expertise or production resources.

Though a significant amount of work in this area is done in newer formats—video, interactive websites, Skype, digital radio—we continue to support hardcopy publications because of their widespread use in universities and at community-based organizations. **Architects/Designers/Planners for Social Responsibility, Inc.'s** *New Village Press* (with Ecological Innovation and Collaborative Initiatives) publishes books that advance the understanding of the impact of the arts on social justice issues. The Press is committed to bringing to the public successful examples of sustainable communities and vibrant community culture; and documents solutions to some of the seemingly intractable social, environmental and economic challenges of our times.

#### **Objective 4: Policy**

**To support public policies that strengthen artistic and cultural communities and enable creators and collaborators to create broad alliances in pursuit of common goals.**

While many of the cultural policy organizations that we helped launch in the early 90s no longer exist, media policy organizations are on the rise. The **Proteus Fund, Inc.**'s *Media Democracy Fund* (with Collaborative Initiatives) is a collaborative grantmaking initiative that supports groups working to create a just media environment and democratic media policy. The fund creates equitable access to broadband Internet in underserved rural and low income urban areas, protects the internet as an open network and works to diversify the base of those engaged in media policy issues.

The **Louisiana Cultural Economy Foundation, Inc.**, supports the development and enhancement of the distinct cultural industry of Louisiana and its workforce. The LCEF works to connect cultural economy workers with existing resources; develops new, innovative and sustainable resources; and encourages potential partners to assist in rebuilding the cultural infrastructure. The **Pratt Institute's Initiative for Arts & Community Development**, (a PAG with Collaborative Initiatives) is a project that connects arts, culture and equitable development, to strengthen low-income neighborhoods and make systemic change. The Pratt Center is concerned with quality of life issues, causes of poverty and inequality, and uses research, community engagement and media mapping to advance sustainable development. Pratt facilitates conversations between artists and policymakers interested in collaborating across sectors.

**State Voices**, formerly the Center for Civic Participation (with Collaborative Initiatives and Jewish Life and Values) links activists from a variety of sectors with artists who are seeking solutions to policy concerns that they share. **The Craft Emergency Relief Fund, Inc.** (with Collaborative Initiatives) is continuing some of the work that we began with our focus on New Orleans, by ensuring that there is a safety net for artists and arts organizations through out the country during and after disasters.

**The Center for Urban Pedagogy** (with Collaborative Initiatives and Ecological Innovations) creates posters and pamphlets in cooperation with social justice groups and award-winning graphic artists that explain policy issues. **Americans for the Arts'** project, the *Art and Social Change Mapping Initiative*, will identify funders and nonprofits that are engaged in art and social justice, art and community building and art and civic engagement initiatives. The will be placed on the web on database that can be regularly updated. Finally, **Teachers College Aging Artists Project** (with Collaborative Initiatives) is the continuation of a longitudinal study that examines the career paths of aging artists, assesses their needs and identifies lessons that they can teach the next generation.

#### **CONCLUSION**

The field of art and social justice is growing as more funders and arts groups aspire to do more for communities that seek to make meaning, be of service, and uplift one another during particularly difficult times. Our efforts to map the field, and share ideas and key learnings have helped make the case for these programs. Additionally, the results of recent studies that have measured the impact of this work, have provided the field with new tools for assessing this work as well as compelling arguments for moving forward with new art and social justice initiatives.

Projects that are currently underway include mapping the field of Arts and Social Justice funder and grantee activity; building coalitions with funders working in other program areas; documenting exceptional examples of art and social justice projects; identifying studies and research that can inform our work; working more closely with other types of social justice organizations; and convening multi-disciplinary cohorts so that we can build alliances.

# *Ecological Innovation Program*

2009

## **INTRODUCTION**

Two Thousand Nine was the first year under NCF's new Ecological Innovation Program grant guidelines and the first under the new federal Administration. The new guidelines were a good fit for the moment, with a focus on global warming, innovation and institutional accountability. The fight over climate policy was finally engaged in earnest, and NCF grantees were well positioned to influence the outcome.

The 2009 Ecological Innovation Program work plan concluded:

*"We are entering a period of extraordinary challenges and opportunities. We may never in our lifetimes see a better chance to advance integrated solutions to problems including climate change, the global economic crisis, national and international security and human health... We've been given an opportunity, and we should be bold in seizing it."*

Our objectives reflected this bold and hopeful agenda, and this made sense when they were developed at the end of 2008. The six years that NCF grantees had put into shifting the climate discourse and policy agenda had paid off, and President Obama had been elected on a mandate to solve some of our thorniest problems through large investments in clean energy. Upon taking office, Obama and Congress enacted a stimulus bill that included over \$80 billion for energy efficiency and clean energy, and promised to invest \$150 billion more over ten years. The major environmental groups and many members of Congress had radically shifted their discourse away from a narrow focus on climate impacts to one focused on creating clean energy jobs. We had good reason to hope that we would make additional and significant progress toward realizing our goals during the year.

Unfortunately, our early optimism gave way to a more sober assessment. Some of the opportunities we identified in January evaporated in the heat of interest group politics, and still others collapsed due to ideological inertia. While we had a President and Congressional leadership who were committed to at least some form of action on climate policy, lobbyists for the environmental groups were outnumbered and outgunned by other interests. More worrisome, environmental allies were intent on sticking to an old playbook that played to the strengths of their opponents. By emphasizing a regulatory regime to place a price on carbon emissions – and potentially increase prices on everything from gas to groceries – climate activists created an opening for worn but effective arguments about the supposedly high economic costs of action. By pairing regulation with a trading scheme, fears about creating a large – and gameable – derivatives market dominated by financial speculators gained currency. Finally, the organizations NCF had helped to create in order to set forth plausible alternatives to this problematic policy instead became advocates for it, leaving few resources to promote better approaches.



While we were not where we hoped we would be by the end of the year, our goals for the year remained fully relevant and some significant progress was made to attain them. We also learned important lessons from the events of the year, and by the end of 2009 NCF grantees were prepared to offer a well-developed alternative to the poor choices offered by the mainstream debate. This alternative would re-frame the discourse to focus on the economic (and political) benefits of investment in green innovation. The idea is to replace the old paradigm – making dirty energy expensive – with a new one – making clean energy cheap, in order to engage many more people.

## **ECOLOGICAL INNOVATION PROGRAM**

**GOAL:** To address the challenges of climate change and to promote vibrant and sustainable ecological systems that support healthy communities and a just economy.

**OBJECTIVE 1. Alliance Building** -- To encourage the development of broad alliances that advance integrated and sustainable approaches to social, economic and ecological justice.

Making significant progress on climate change has proven to be difficult, in part because of the inability of the mainstream effort to engage larger numbers of Americans. As scientifically accurate as global warming horror stories may be, studies show that their use by environmental groups may be having the opposite of the intended effect; recent public opinion research shows that Americans are becoming less, not more, committed to taking serious action on climate change. NCF grantees have championed a different strategy; rather than scare people, inspire them with a vision of the future green economy.

Two grants were made to advance this agenda at the national level. The first was made to the **Natural Capital Institute** to renew support for *Green for All*, the new national initiative founded by the Ella Baker Center's Van Jones. Green for All had a phenomenally successful first year, helping to win approval for \$500 million for green job training in the President's stimulus package. And NCF supported the second annual *Good Jobs, Green Jobs Conference*, a project of the **Public Health Institute, Inc.**, to bring together the largest gathering to date of labor, business, environment and environmental justice organizations focused on the transition to a clean energy economy.

Another set of grants supported alliance building for ecological sustainability, community health and economic fairness in California. A grant was made to the **Ella Baker Center For Human Rights in California** for *The Green Collar Jobs Campaign* and *Soul of the City* to expand its clean energy career training and green economic stimulus project launched in Oakland with NCF support. The Ecological Innovation and Health Programs, along with Collaborative Initiatives also renewed funding to the **Environmental Health Coalition**, working in San Diego to advance a positive, solution-oriented approach to environmental justice and economic development. These three programs also made a grant to the **Liberty Hill Foundation** as it continues to build a more effective social and environmental justice infrastructure in Los Angeles. The grant was made to support *Promoting Environmental Justice and Sustainability*, which is integrating initiatives for clean energy generation, energy efficiency, water efficiency, transportation efficiency and cumulative environmental impact analysis. This grant complemented first-time funding for the *UCLA Labor Center*, a project of **The Regents of the University of California**,

made along with Collaborative Initiatives to support the Center's push to bring diverse allies together to create high-wage green jobs in LA.

**The University Corporation, San Francisco State**, was supported to further its work with the Ella Baker Center, the Bay Area's high-tech industries, Lawrence Berkeley National labs and four East Bay cities to develop and disseminate a model for *Green Energy Technology Academies* to train young people for careers in the emerging green economy.

To support green economy work in the Midwest, Ecological Innovation, Health and Collaborative Initiatives made a renewal grant to the **Center for Labor and Community Research's Chicago Manufacturing Renaissance**, for its work to achieve long-term and sustainable benefits for manufacturers, workers, the environment, health and the broader community. Ecological Innovation and Collaborative Initiatives supported **Global Philanthropy Partnerships (GPP)** to support the *Chicago Climate Action Plan (CCAP)*. The CCAP provides a detailed plan for reducing greenhouse gas emissions from buildings, including residential retrofits of almost half of Chicago housing.

In the New York Area, grants were made to **Urban Agenda**, for *The New York City Apollo Alliance*, **UPROSE**, and the **Lincoln Park Coast Cultural District (LPCCD)**. NYC Apollo works to highlight the linkage between sustainability and economic development advanced by Mayor Bloomberg's PlaNYC 2030. UPROSE works to ensure that the ecological sustainability goals of New York City and State include equitable distribution of funds and resources. And through the work of LPCCD, recommended along with the Arts and Culture Program, Newark is becoming a national laboratory for the construction of the environmentally and socially sustainable inner city of the future (with the help of Newark's Mayor and national groups including NCF grantees Green for All, Apollo, MIT's Green Hub and COWS).

Ecological Innovation, Health and Collaborative Initiatives renewed funding for the **Western Organization of Resource Councils Education Project (WORCEP)**, which is bringing a wide and diverse group of people together in the Rocky Mountain West to offer practical alternatives to the fossil fuel economy through the *Responsible Energy Development Program*.

Two grants were made along with the Jewish Life and Collaborative Initiatives. The first renewed NCF support for *Women and the Environment: Agents of Change in Israel*, an initiative of **The New Israel Fund**. The Environment Program contribution was intended to bolster support for The Green Environment Fund (GEF) component of the larger grant. GEF is working to build a values-based environmental movement in Israel, foster a sustainable environment, and safeguard the public health of all Israeli citizens. The second grant supported **Hazon, Inc., which** works in the US and in Israel to position issues of sustainability as critical to our collective future and central to Jewish life.

Three grants were made following the lead of the Arts and Culture Program, the first to the **New Village Press** to bring successful examples of sustainable communities and vibrant community culture to public awareness. The second was to the **Backbone Campaign** to support the *Procession for the Future 2010 Tour*, an initiative that uses creative tools to advance organizing on behalf of human dignity and environmental sustainability. And the third was made to support

the **Public Design Studio** for "*The 1% Program: Strengthening Nonprofits Through Design*," an initiative to strengthen communities and advance ecological sustainability through design and institutionalized pro-bono service in the architecture and design professions.

**OBJECTIVE 2. Institutional Accountability** – To promote innovative public policies and other approaches by which corporations, governments and other institutions take responsibility for the real risks and costs of their activities and become drivers of positive ecological and social change.

A complementary set of grants was made to advance the clean-energy, jobs and national security agenda by building the public policy case for alternatives to the fossil-fuel economy. In conjunction with Collaborative Initiatives, a renewal grant was made to *Seizing the Energy Opportunity*, a project of the **Center for American Progress**. Renewed support helped CAP build on last year's study on the need for public investment in the transition to a low-carbon economy. That study was highly influential in the design of the President's stimulus package, with NCF's investment leveraging several tens of billions of dollars in federal spending. The Ecological Innovation and Health Programs partnered with Collaborative Initiatives to renew support for *The Breakthrough Institute* and its "*Expanding the Breakthrough*" (a project of **Rockefeller Philanthropy Advisors, Inc.**) Breakthrough continued to make an influential case for an investment-centered approach to climate change aimed at making clean energy cheap, creating jobs and reducing oil dependency.

The Ecological Innovation Program and Collaborative Initiatives also made a grant to the **University of Maryland Foundation** to support a major *book project* by *Gar Alperovitz*, historian, political economist and author. The book will synthesize several decades of scholarship and present a politically plausible alternative to the economic theories that contributed to the global economic crisis and that help propel the ongoing ecological crisis. Another grant was made along with Collaborative Initiatives to the **Information Technology and Innovation Foundation** to advance a promising new framework known as "innovation economics" to put innovation at the center of economic and global warming policy. Finally, the Ecological Innovation Program and Collaborative Initiatives made a grant to **The Tides Center** for the *Apollo Project* to allow Apollo to co-host a national conference with the Center for American Progress on the role of American manufacturing in the green economy.

The next three grants to advance the goal of institutional accountability also renewed support provided in partnership with Collaborative Initiatives. The first was the *Global Warming Litigation Project*, a collaboration between the **Civil Society Institute** (CSI) and the Natural Resources Defense Council (NRDC), that brings together state attorneys general, top civil litigators and environmental groups to hold corporations legally accountable for their greenhouse gas emissions. The second, **Ceres, Inc.**, through its *Investor Strategy on Climate Change* is working with investors holding trillions of dollars in assets to make climate risk a priority for corporate management and boards of directors. The third, to the **Center for Political Accountability** for its *Climate Change Initiative*, which encourages companies to provide full disclosure of political contributions in order to end the pervasive secrecy that hides corporate political activity -- including lobbying against action on global warming -- from shareholders.

The Ecological Innovation and Contemplative Practice Programs renewed support for another US project with a global perspective, the *Green Hub*, a project of the Massachusetts Institute of Technology and **Policy Link**. The Green Hub is a cross-disciplinary, cross-institutional round table of leaders working towards the ecological transformation of the economy with a focus on the greening of cities, both in the US and in the global south. The Green Hub is unique, both in terms of the technical capacities it is able to bring to bear, but also in its commitment to contemplative practice, social equity and inclusion as the path to sustainability.

The Green Hub is also connected to *The Emerald Cities Initiative*, a project of **Enterprise Community Partners** and NCF grantees at the University of Wisconsin (COWS) and MIT. A PAG was made along with Collaborative Initiatives to launch Emerald Cities, taking a lead that was followed by other major funders including Ford, Kresge, Rockefeller and Annie E. Casey. Emerald Cities is working with the White House and with labor unions and community organizations in cities around the country to create good jobs retrofitting buildings for energy efficiency and to cut greenhouse gas emissions.

A particularly well-integrated example of the kind of work Emerald Cities is promoting can be found in Cleveland, and the Ecological Innovation Program and Collaborative Initiatives made a grant to the **University of Maryland Foundation** to support it. This initiative, done in collaboration with the Cleveland Foundation, goes beyond job creation strategies to create new models of employee ownership and community wealth building. Following the lead of the Health Program, a grant was made to support the **Center on Policy Initiatives** in its work to make San Diego a healthy community with a public policy agenda that integrates family health care, quality jobs, and a cleaner environment.

Along with the Health Program and Collaborative Initiatives, a renewal grant was provided to **Strategic Concepts in Organizing and Policy Education** for its California statewide *Tax and Fiscal Policies Project*. The project is designed to build the case for public investment in an environmentally sustainable and socially just future. Also with the Health Program, renewal funding was given to **Working Partnerships USA** for the sophisticated work it does to educate a diverse constituency about public policies that benefit the environment and working people. Health and Ecological Innovation also teamed up to provide funding for the *Center for State Innovation (CSI)*, a project of the **University of Wisconsin, Madison**, for its work assisting state executives to develop innovative and, ideally, coordinated "high road" policies that protect important public interests, including the environment and public health. The final Health/Ecological Innovation Program grant in this category was made to the **Partnership for Working Families** which works with affiliates in 18 cities on community benefit agreements (CBAs) and policies that hold corporations and governments accountable for providing public and environmental benefits in return for public investments.

All four programs joined Collaborative Initiatives in recommending renewed support for *NOW on PBS*, a project of the **Educational Broadcasting Corporation** and *FRONTLINE*, "*Breaking the Bank*," a project of **WGBH Educational Foundation**. Prior to its unfortunate cancellation by PBS, NOW's coverage of environmental health, health, arts and culture and faith issues was unmatched in primetime television. During 2009 NOW instituted a new financial beat called "Out of the Woods" which provided ongoing coverage of the financial crisis and government's response, a crosscutting issue of concern to all NCF programs. Similarly, FRONTLINE'S

“Breaking the Bank” investigated the causes of the economic crisis, how the government has responded to it and the need for fiscal reform.

Grants were also made in partnership with Collaborative Initiatives to a pair of projects addressing crosscutting issues by the **PERI Support Fund, Inc.** and **Proteus Fund, Inc.** These grants were designed to help build the economic case for both short-term economic stimulus and long-term public investment in the transition to an economy founded on ecological sustainability and broadly-shared prosperity. PERI’s *Fiscal Responsibility Project* commissioned new research, articulated and demonstrated consensus among economists, and educated policymakers, funders and advocates about the need for long-term federal investments in a range of areas, from clean energy technologies, to healthcare, transportation and education. The Proteus Fund’s *Economic Information Center* commissioned in-depth analysis of the values that shape public opinion about “fiscal responsibility” with the goal of creating policies and messages to shape the debate on a host of issues, from healthcare reform to global warming, and inform policymakers, funders and advocates.

Complementing this work, another PAG was made with Collaborative Initiatives to **Demos: A Network for Ideas and Action, Ltd** for its *Thinking Big, Thinking Forward Conference*. The conference served as the kickoff event to urge the new administration to adopt an ambitious approach to public spending as a means to accomplish preliminary recovery from the financial crisis, enable greater long-term economic growth and reduce inequality and sustained social and environmental progress.

Along with Collaborative Initiatives and following the lead of the Health Program, three grants were made to ensure greater institutional accountability: to the **Los Angeles Alliance for a New Economy** (LAANE); the **Front Range Economic Strategy Center** (FRESC); and the **Government Accountability Project, Inc** (GAP). LAANE and FRESC are working in LA and Denver respectively to shift the logic of decision-making about economic development so that quality jobs, affordable housing, clean air and water, and access to health care become part of the purposes of development. GAP’s *Environmental and Health Campaigns* worked to develop a coordinated national approach to dealing with the challenges of global warming impacts and response strategies.

Following the lead of the Arts and Culture Program, grants were made to the **Center for Urban Pedagogy** for *Making Policy Public/Envisioning Development Toolkit* and the **Cloud Institute for Sustainability Education** for the *SoL Education Partnership*. The Center for Urban Pedagogy’s “Making Policy Public,” is a framework for artists, designers and advocates to collaborate and produce socially engaged and ecologically sustainable urban design. The Cloud Institute continues to develop a national learning community of schools and communities that plan for a sustainable future. Finally, a PAG was made along with Arts and Culture and Collaborative Initiatives to support the **Friends of the Highline**. The grant supported the public arts program and efforts to engage public housing communities and local public schools in the ongoing programming and employment opportunities on New York’s newest public park.

**CONCLUSION:**

While 2009 was disappointing in some ways, when viewed in the context of the last several years NCF's accomplishments are impressive. As much as any other, this foundation has clearly and consistently supported efforts to move America away from a negative vision to a positive one on climate and the economy. President Obama, members of Congress, the media, think tanks and environmental groups have shifted from a disaster narrative to a focus on clean energy jobs. Our challenge now is extending that shift to a focus on a clean energy economy and clean energy industries — as what's needed are more than short-term jobs retrofitting buildings for energy efficiency — and matching the national policy agenda to this goal.

In the midst of unprecedented global economic and ecological crises, it's not clear that incrementalism can succeed or that something more transformative will be given a chance. While the ideas promoted by NCF grantees have significantly shaped this political moment around the possibility that solutions to the economic crisis are also solutions to the ecological crisis, a combination of powerful interests and orthodox thinking threatens to undermine progress toward the paired goals.

NCF grantees will continue to play an important part in the tug-of-war between incrementalism and transformation. We will continue to look for strategic opportunities to support transformative initiatives and policies, and to connect the groups that are pushing in the right direction.

# *Contemplative Practice Program*

2009

## **INTRODUCTION**

The unexamined and unchallenged mental models we hold are often the biggest barriers to progress. There are countless examples of the kinds of ideas that help keep public discourse locked in unproductive ruts: assuming that we can count on environmentalists alone to protect the environment; that art and culture are expendable luxuries in a down economy; or that because we can all go to the emergency room we all have access to health care. Contemplative practice can help us see things in new ways, make us aware of our own assumptions, help us listen more actively and ultimately change the way we approach challenges. Contemplative Practice grants were made according to new Grants Guidelines in 2009, and were intended to help:

- Redefine “the environment” and what it means to care about it;
- Illustrate the interconnectedness of environmental, social and economic issues;
- Make the connection between daily life-style choices and larger systemic issues, such as biodiversity and global poverty; and
- Fill people’s need for social connectedness and a sense of purpose in life as a way to drive engagement.

**GOAL:** To promote innovation in furtherance of the foundation’s core values of social, economic and ecological justice through the development and dissemination of contemplative practices that lead to fresh insights, creativity and effective collaboration.

A grant was made to the Massachusetts Institute of Technology’s *CoLab*, a project of **Policy Link**, which is advancing a set of projects with NCF grantees including the Green Hub and Emerald Cities to bring together contemplative and non-contemplative practices to advance goals of ecological sustainability and economic fairness. CoLab is applying “social technologies” designed to help leaders listen to, learn from, and work with each other as they tackle complex challenges. This work utilizes Theory U, a set of contemplative practices in development at MIT for the past ten years, to create highly effective teams of problem solvers representing diverse backgrounds and interests. Renewal support was provided for **Peace on the Street**, a program that brings meditation practice to practical use on the streets and in the housing projects of East Harlem. Peace on the Street is dedicated to employing values-driven and reflective practice to develop a new generation of individuals and organizations working for social justice.

**Yale University** received a grant to support “*The Journey of the Universe*,” a project that includes a documentary film to be broadcast on PBS, a web site and educational materials. “Journey” is created by the talents behind PBS’s Cosmos series with Carl Sagan, the co-author (with Thomas Berry) of “The Universe Story,” and one of the country’s leading theologians dealing with questions of religion and ecology. It offers fresh insights into the nature of the universe and human existence, and opens the door to new ways of seeing the problems that confront us and solutions we might not otherwise see.

**CONCLUSION:** NCF staff will continue to engage with our grantees to develop contemplative paths to innovation, creativity and more effective collaboration. The work at MIT, for example, is now focused on a series of interviews and meetings with thought leaders about the emerging “next” economy. We will be participating with them as they work with those grantees and convene thinkers from around the world to engage in this critical work.



# *Health Program*

## *2009*

### **INTRODUCTION**

With a new Administration in Washington and a new set of program guidelines prioritizing health access, environmental health and capacity building, the work supported by the Health Program in 2009 directly engaged some of the most pressing topics of the day. Once in office, President Obama announced a renewed commitment to integrity in science and protections for whistleblowers, raising important concerns about public health and safety. At the same time, increasing public concern about global warming and the impacts of economic development played out in struggles to balance economic growth in times of economic distress with the creation of sustainable and healthier communities.

Even more significantly for the Health Program, the new President made health reform his top domestic policy priority. Over the previous several years, NCF had invested in the development of a strong network of consumer health advocates building public demand for fundamental reform of the health care system to expand access, improve quality and contain costs. Based in large part on an influential analysis by NCF grantee Center for Budget and Policy Priorities, the President argued that rising health care costs are the greatest long-term threat to the federal budget as well as to the economic well-being of American families. He linked the pressing need for cost containment and better value to the country's moral responsibility to provide all Americans with access to quality care, and he called on Congress to present him with a plan. Early in 2009 it appeared we were on a fast track to reform.

But the push toward national health reform became entangled in political maneuvering and interest group politics and extended long past the date when most observers predicted it would have succeeded or failed. The public debate was marked by partisan squabbling, health care protests and counter-protests and shifting alliances among industry, provider and consumer stakeholder groups. Congress labored to achieve bipartisan consensus even as policymakers experienced escalating attacks by those on the right who feared the beginnings of a government takeover of health care and by those on the left who were concerned that reform would further institutionalize massive corporate interests in a profit-driven system.

At the end of 2009, it was still not clear whether a reform bill would pass. However, the issues, policies and frameworks in the debate over reform were very much shaped by the groundwork laid by NCF grantees. As the process moved forward their insistent focus on the consumer perspective and their deep policy, communications and organizing capacity played an essential role in ensuring that the priorities of health care consumers continued to be articulated and addressed in the public debate.

### **GOAL**

The goal of the health program is to improve Americans' health by ensuring that all people in the United States have access to high quality and affordable health care and live in a healthy environment.

## OBJECTIVE I: HEALTH ACCESS

*To ensure access to high quality and affordable health care for all by supporting systemic change, fostering innovation and facilitating the development and implementation of equitable and sustainable public policies. Priority will be given to initiatives that have state-wide, regional or national impact.*

The convergence of the President's strong leadership on health care, the economic crisis and rapidly escalating health care costs created real momentum behind efforts to achieve federal health reform during early 2009. At the time the outcome was far from assured – with health care accounting for close to 18% of the economy, a variety of powerful stakeholders with diverse goals (and robust lobbying budgets), including the health insurance, pharmaceutical and biotechnology industries, hospitals, clinics, doctors, paraprofessionals, medical equipment suppliers, large employers, small employers, labor unions, patient groups and many others, lined up to ensure that their interests would be protected. During the last major effort at broad federal reform in the 1990's, consumer advocates and their allies were badly out-manuevered by health insurance, business and other constituencies that were at the time flatly opposed to reform. Although some of the political imperatives realigned – for instance, this time around the insurance industry actively negotiated with government officials over the terms of a reform plan – it was essential to ensure that those representing consumer interests had the capacity to drive the agenda and simultaneously respond effectively to the sorts of objections based on claims about cost and "socialized medicine" that had been effective in stopping progress in the past.

NCF's steady support for a core group of policy experts, economic analysts and advocacy coalitions promoting consumer interests was critical to developing that capacity. First, together with Collaborative Initiatives, the Health Program renewed support for the **Center on Budget and Policy Priorities**. A trusted source of policy and technical expertise, CBPP was the architect of a powerful economic analysis demonstrating that rising health costs are the most important long-term economic challenge facing the country. Also receiving support was the **New America Foundation's Roadmap to Health Reform**. The *Roadmap* project filled a unique niche in Washington, facilitating evidence-based discussions and finding common ground among stakeholders and policymakers coming from diverse and often opposed ideological positions. A well-respected source of economic and policy analysis, the project played a valuable role in offering a framework for dialogue in an increasingly partisan and acrimonious environment.

The Health Program also made a grant to a number of grantees reflecting different stakeholder groups. The **National Council of La Raza's Health Policy Project**, which represents the interests of a rapidly-growing Latino population, emerged as a key ally in a number of the major national consumer coalitions working on health reform. The *Women and Health Reform Project* of the **National Women's Law Center** was essential to identifying and advocating for women's concerns within the health care system, including coverage of reproductive health care and elimination of gender-based discrimination on price and access in the individual insurance market. The *Small Business Majority*, a project of **Demos: A Network for Ideas and Action, Ltd.**, built a small business voice nationally in support of comprehensive healthcare reform. Although it had been engaged on health care at the national level for only two years, SBM was increasingly seen as a progressive counterweight to organizations like the National Federation of

Independent Business – an influential small business association that has in the past reflexively opposed reform.

Also receiving grants in 2009 were several projects with deep roots in the states that had the capacity and sophistication to pivot and work on national issues as well. In doing so, they used their on-the-ground experience to bring a practical perspective to their policy work while using their understanding of national developments to shape and coordinate their work back home. First, the **Center for Rural Affairs** received support from the Health Program and Collaborative Initiatives for *Creating a Rural Constituency for Health Care Reform*. This project leveraged the Center's past work on rural development and agriculture issues to bring a rural consumer perspective to the health reform debates in Montana, Iowa, North Dakota and Wisconsin. The Center also received a Presidential Authority Grant to intensify its work in Montana and to expand it to Nebraska to ensure that policymakers considering any national reform plan will understand the needs of rural areas. Next, *Health Care for Health Care Workers*, a project of **Paraprofessional Healthcare Institute, Inc.**, worked in states and nationally to develop strategies to provide health coverage to all health care workers as an incremental step in broader national health and long-term care reform agendas. Finally, the **Pacific Institute for Community Organizations'** *Cover All Families Campaign* secured a grant from the Health and Jewish Life and Values Programs along with Collaborative Initiatives. This national congregation-based network, comprised of 1,000 member institutions representing one million families in 150 cities and 17 states, opened a national office in Washington D.C. and was a leader in bringing the faith community's voice to the debate over health care for all. At the same time it continued to work at the state and local levels to build public support for expanding health coverage to uninsured and underinsured children and adults.

Policymakers debating how to move forward on the federal level looked to the states for examples of innovative strategies for improving access, containing costs and enhancing quality. Many of the state-level experiments serving as models for the reform effort were conceptualized, designed and/or implemented by grantees supported by NCF over the previous several years. For instance, federal policymakers relied on Massachusetts' 2006 health reform law as a template for the architecture of many of the reform proposals that were discussed, particularly with respect to the "exchanges" or virtual marketplaces where uninsured people can purchase insurance. **Health Care for All, Inc.**, a Boston-based consumer health group, was central to the design and negotiation of that effort and received support for its ongoing work to protect consumer interests as implementation of its state reform progressed. Two additional grantees – the *Massachusetts Health Care Reform Implementation Project* of the **Greater Boston Interfaith Organization Sponsoring Committee, Inc.**, and the *Greater Boston Synagogue Organizing Project* of the **Jewish Community Relations Council of Greater Boston** – received grants from the Health Program, in partnership with the Jewish Life and Values Program and Collaborative Initiatives, to continue their excellent organizing work in Massachusetts around health care affordability under reform.

Other state experiments also continued to provide important lessons about pitfalls and possibilities for national reform. The Health Program provided renewed support to groups working in Florida (**Florida Community Health Action Network, Inc.**), Illinois (**Sargent Shriver National Center on Poverty Law** and the **Campaign for Better Health Care Fund**,

Louisiana (**Helping Hands, Inc. of Lafayette**), Maine (**Consumers for Affordable Health Care Foundation**), Maryland (**Maryland Citizens' Health Initiative Education Fund, Inc.**), Minnesota (**TakeAction Minnesota Education Fund**), Ohio (**Universal Health Care Action Network of Ohio**), Pennsylvania (**Unemployment Information Center**), Vermont (**Campaign for Health Care Security Education Fund**), and Wisconsin (**Citizen Action of Wisconsin Education Fund, Inc.**).

Finally, the Health Program and Collaborative Initiatives supported a new grantee, **Yeshiva University (Benjamin N. Cardozo School of Law/Yeshiva University)**, for the *Public Patent Foundation*. As part of a broader strategy challenging the whole notion of patenting genes, the Public Patent Foundation filed a lawsuit charging that patents on two human “BRCA” genes, which are associated with breast and ovarian cancer, are unconstitutional and invalid. The lawsuit was filed on behalf of four scientific organizations representing more than 150,000 geneticists, pathologists, and laboratory professionals, as well as individual researchers, breast cancer and women's health groups, and individual women. Because these gene patent holders can and have prevented anyone from studying or testing these genes, scientific research and genetic testing has been delayed and even shut down. Approximately 20 percent of all human genes are patented, including genes associated with Alzheimer's disease, muscular dystrophy, colon cancer, asthma and many other illnesses, so the outcome of this case could have a tremendous impact.

## **OBJECTIVE II: ENVIRONMENTAL HEALTH**

*To create a healthier, more equitable and sustainable quality of life by supporting systemic change, fostering innovation and facilitating the development and implementation of public policies resulting in businesses, government and other institutions taking responsibility for the real health and social impacts of their activities.*

Particularly in times of economic crisis, a key strategy in protecting environmental health is to provide real alternatives to the kinds of trade-offs between jobs and the environment that often dominate local economic development debates. As part of this approach, the Health Program, in partnership with the Ecological Innovation Program and Collaborative Initiatives, supported a series of grantees working to reframe the goals of local development to include both economic growth and healthier communities. **Working Partnerships USA**, an organization based in San Jose, California, uses research, organizing and a strong communications program to promote policies that will create healthier, more environmentally sustainable and economically just communities. Working Partnerships has been a leader in creatively using land-use and other government approval processes as an opportunity to advocate for improved community health and has developed strategies to ensure that local needs regarding open space, healthy food, access to health providers and good, green jobs are made a priority in decisions about public subsidies for economic development projects. The **Los Angeles Alliance for a New Economy (LAANE)** works closely with labor, community, environmental and faith-based groups to hold businesses accountable for providing quality jobs and for addressing the environmental impacts of their activities on workers and local residents. Using a similar approach, the **Front Range Economic Strategy Center** works in the Denver metropolitan area to hold governments and corporations accountable for responsible community-centered development and the protection of the health and welfare of low-income workers and their families. And the **Center on Policy**

**Initiatives**, working in San Diego, also focuses on developing innovative economic development and other policies that promote green middle-class jobs with healthcare, sustainable development, and greater community benefits.

These groups all are anchor members of the **Partnership for Working Families**: a strong national network of partner organizations in 17 cities across the country that works with national and regional labor, health, environmental, faith and community organizing groups to improve access to fair wages, good health care and a clean and healthy environment.

Also supported by Health, Ecological Innovation and Collaborative Initiatives was the *Environmental and Health Campaigns* of the **Government Accountability Project Inc. (GAP)**. GAP's work has focused on investigating and, where appropriate, publicizing allegations of government or corporate wrongdoing with respect to food and drug safety, environmental oversight, and nuclear safety. Building on the expertise and strategic partnerships it developed from its Climate Science Watch project, GAP spearheaded a planning process for the formation of a government-supported National Climate Change Preparedness Initiative that will develop a coordinated national approach to dealing with the health impacts and other challenges of global warming as well as response strategies. Complementing this approach, led by Ecological Innovation, Health and Collaborative Initiatives renewed support for two grants that are experimenting with local solutions to global climate change. The *Chicago Manufacturing Renaissance Council*, a project of the **Center for Labor and Community Research**, develops real world examples of a sustainable "green collar economy" that provides health, environmental and social benefits to its residents. CMRC opened new schools to train future workers and business owners and will launch the Chicago Wind Manufacturing Network to develop the participation of local companies in a rapidly expanding market linked to climate change and renewable energy. The **Western Organization of Resource Councils Education Project's Responsible Energy Development Program** works in the Great Plains and Rocky Mountain states to build organizing capacity to combat climate change and its health impacts by promoting responsible energy development and local alternatives to fossil fuels.

Following the lead of the Ecological Innovation Program, the Health Program and Collaborative Initiatives made grants to three other California-based organizations. **Strategic Concepts in Organizing and Policy Education** has built a progressive statewide alliance of key health, environmental and labor groups and is working to design and implement a tax and fiscal policy reform agenda that will result in a more just, sustainable and healthier future. The **Liberty Hill Foundation's** project, *Promoting Environmental Justice & Sustainability in LA*, is building a movement for social, economic, and environmental justice to advance innovative environmental policies in Los Angeles, while setting precedents for the nation. And the *Green Energy and Good Jobs Campaign* of the **Environmental Health Coalition** works in at-risk neighborhoods in San Diego to advance a positive community-driven vision of environmental justice and to export that vision to the state level.

Following the lead of the Ecological Innovation Program, the Health Program also supported *The Breakthrough Institute: Expanding the Breakthrough*, a project of **Rockefeller Philanthropy Advisors, Inc.** The project will expand the focus of its analysis and policy development to climate-related work on the economy and will develop strategies to take advantage of

opportunities to advance ecological sustainability and public health created by governance reform in California.

Finally, the Health Program, together with Ecological Innovation and Collaborative Initiatives, made a Presidential Authority Grant to the *Gulf Coast Community Renewal Project* of the **Institute for Sustainable Communities (ISC)**. In the aftermath of Hurricane Katrina, a critical set of civic leaders emerged in small, traditionally underserved communities throughout the Gulf Coast. They expressed great interest in forming stronger connections to each other and developing new knowledge, skills and resources to help their communities approach economic development and rebuilding in a sustainable, healthier way. ISC was the natural vehicle to facilitate this process; it did a good job with its earlier NCF-funded Moss Point, Mississippi pilot project, learning how best to build institutional capacity to address public and environmental health challenges in this struggling region, and took what it learned to an additional set of communities in the Sustainable Communities Network. In this second and final year of its involvement in the Network, ISC planned to facilitate an international exchange with community leaders rebuilding earthquake-affected communities in Sichuan Province, China and prepare the group to be self-led and self-sustaining.

### **OBJECTIVE III: CAPACITY BUILDING**

*To increase the capacity of healthcare advocates, healthcare consumers, and other stakeholders to influence public debates, shape public policy, and build effective alliances.*

Under the new Capacity Building guideline, the Health Program provided renewed funding to a series of organizations with national reach that provide essential research, policy, messaging and public opinion, coordination and other technical support to enhance the effectiveness of consumer health advocates in the field. The **Herndon Alliance**, which received both a core grant and a PAG, provides its 200 members and their allies across the country with invaluable messaging and analytic research, coordination support, and timely updates on the status of federal reform efforts. It has played a central role in coordinating communications strategies nationally among major labor, advocacy and other stakeholders, while ensuring that smaller state-based groups have access to the same high-quality research and strategic analysis. **Community Catalyst** provides intensive organizational development, policy, analytic, organizing, legal and other technical support to networks of state-based advocates working to expand access to high quality and affordable healthcare at both the state and federal levels. The **Universal Health Care Action Network**, which received a Presidential Authority Grant, also works with and connects state-based health care advocacy groups with each other and with national organizations in order to facilitate collaboration, promote the sharing of resources, information and best practices, and encourage the development of new alliances and broader coalitions. And the **National Health Law Program** is one of the leading sources of legal and strategic consultation and support to legal services and other advocates working to protect health programs for low-income people. NHeLP's *Court Watch Project* helps advocates to ensure that the courts remain available to beneficiaries of Medicaid and other public programs, while its *Sunshine and Accountability Project* improves government and corporate accountability in health care spending by working with state-based partners to expose waste and profiteering by private insurers and other health care contractors supported by taxpayer funds.

The Health and Ecological Innovation Programs along with Collaborative Initiatives also made a grant to help states and local communities to plan for and generate a healthier, more sustainable future. The approach of the *Center for State Innovation*, a project of the **University of Wisconsin, Madison**, is based on the notion that the challenges facing our democracy — e.g., globalization, the collapse of the postwar “social contract,” new military and environmental threats, frayed citizen confidence in democratic capacity — will require renewed progressive state leadership and policy innovation. CSI, therefore, provides state government officials across the country with practical, implementable research that focuses on building institutional policy infrastructure to improve health, the environment, economic development, public safety and transportation.

In partnership with Collaborative Initiatives, all program areas together supported two media projects that provide clear-eyed information and analysis to the public and policymakers. *NOW on PBS*, a project of the **Educational Broadcasting Corporation**, uses a signature in-the-field reporting style to cover issues including the environment, health, arts and culture, faith and the economy. And *Frontline/“Breaking the Bank,”* a project of the **WGBH Educational Foundation**, is investigating the causes of the economic crisis, how the government has responded to it and the need for fiscal reform.

The Health Program also made a grant to an affinity group – **Grantmakers in Health**– to facilitate alliances and engage with potential partners.

Finally, together with Ecological Innovation and Collaborative Initiatives, the Health Program made two additional Presidential Authority Grants late in 2009. The first, to *The Data 2.0 Project* of the **National Priorities Project (NPP)**, supported upgrades and expansions to NPP’s unique database of federal budget and spending information, state and local social indicators data, and other data easily accessible nowhere else. This tool is used by NPP as well as outside researchers, advocates, media, grassroots activists and citizens to develop analyses, reports and outreach and education materials in order to increase transparency around the federal budget and to hold government accountable for the impact of spending decisions on state and local communities, in healthcare, energy and other areas. The second was to **Public Interest Projects, Inc.** for *Americans for Financial Reform*: a coalition of nearly 200 national, state and local consumer, labor, retiree, investor, community and civil rights organizations that have come together to educate the public on the need for reform of the financial system in the aftermath of the financial crisis, which has diverted resources away from healthcare, global warming, the environment and other important priorities.

# *Jewish Life and Values Program*

2009

## INTRODUCTION

*As Hillel so famously said:*

*If not now, when?!*

– *Pirke Avot 1:12*

This was not a year for standing by. Despite diminished resources, it was a time for seizing opportunities. With a burgeoning Jewish social justice and Jewish service movement, successful leadership development and congregational-based community organizing programs launched, and a growing progressive religious voice in America, it was the time to build momentum. Issues of social and economic justice were on the forefront of the American people's minds and the search for an ethical, communal, meaningful, and, for some, outright religious response abounded. Our support was all the more needed given both organizations' increased vulnerability and the greater urgency of the work in which they are engaged. Furthermore, with analysts and pundits alike proclaiming a limited window of opportunity, it was a time to do all that was possible to advance peace in the Middle East. In ways both good and challenging, this year brought ample opportunities to bring our influence, strategies, and resources to bear on creating a more just and sustainable nation and world.

**GOAL: To promote *tzedek*/social justice as a core Jewish value, integral to Jewish life and the creation of a more just, vibrant, and sustainable society.**

**Objective 1. JEWISH SOCIAL JUSTICE:** To strengthen the leadership, capacity, and engagement of Jews, Jewish communities, and Jewish institutions to advance social and economic justice as a lived Jewish value.

In addition to our support for such field building initiatives as the *Jewish Social Justice Roundtable*, the *Selah Leadership Program*, and the follow-up research of *Visioning Justice and the American Jewish Community*, networks and key organizations are building blocks to developing a Jewish social justice movement.

We therefore awarded a grant to **American Jewish World Service (AJWS)** for the *Alumni Initiative*, an effort engaging record numbers of young Jews in a peer network of activists. The Initiative also led the field by engaging more than 60 other organizations as partners (including many NCF grantees) and knitting together a web of Jewish social justice efforts, leaders, and initiatives. The strong regional model, high quality leadership training of alumni, and work to crystallize the program's theory of change and communications strategy, all positioned this Initiative as a central player in the building of a Jewish social justice movement.

Together with Collaborative Initiatives we awarded a second grant to **AJWS** to create with two other NCF Jewish service grantees – the Jewish Funds for Justice and PANIM – the *Group*



*Leadership Training Program.* The limited number of talented and experienced Jewish service educators is one of the primary obstacles to growing the field of Jewish service while maintaining quality. AJWS, the Jewish service organization with the greatest expertise in training Jewish service educators, led the collaboration to develop a group leader training course to create standards and assure the availability of a cadre of qualified leaders for Jewish service programs. With the growth of Jewish service, high quality leaders will be a key determinant in whether what is built is a serious field that connects service to underlying issues of social justice and develops young Jewish activists or whether it is merely service tourism.

Supporting another collaborative effort, we gave a grant to the **Jewish Council for Public Affairs** for *Coalition on the Environment and Jewish Life (COEJL)*. After several years of strategic planning and efforts to re-envision COEJL for the new millennium, COEJL was re-launched. COEJL spurs American Jews to reduce their energy consumption, adopt greater environmental responsibility, and take part in advocacy campaigns around issues of climate change and environmental justice. We continue to believe that there is a need for a strong Jewish voice on the environment – in all its manifestations – and hold out hope that with new leadership COEJL can play an important role.

As part of our overall field building strategy, we also supported several key Jewish social justice organizations. Our renewed support, together with Collaborative Initiatives, for the **Progressive Jewish Alliance (PJA)** and our new support to **Jews United for Justice (JUFJ)** reflects the importance of supporting local Jewish social justice groups both on their own terms and as part of a larger effort to create a national movement. PJA continues to have significant impact on a host of issues throughout the state of California; it is also poised to embark on a national expansion. JUFJ had been in serious conversations with PJA about just such a partnership and both organizations required support to enable them to continue to do time-sensitive local work while strategically pursuing a national partnership. Two of the central findings of the report, *Visioning Justice and the American Jewish Community* were the need for a diverse eco-system and the importance of a more coordinated national strategy. PJA and JUFJ's approaches are exemplary of both.

Also, on the national front, together with Collaborative Initiatives, we awarded a grant to the **Union for Reform Judaism** for the *Religious Action Center of Reform Judaism (RAC)*. The RAC is a keystone of the Jewish social justice movement and has expanded several programs that specifically engage young Jews in advocacy and Jewish values. Furthermore, the RAC acts as a critical partner in numerous coalitions, and is often the only Jewish presence at the table. It is also worth noting that the RAC works with more than a dozen other NCF grantees in multiple arenas (including social justice, service, environmentalism, Middle East Peace, and amplifying a progressive religious voice nationally). With the new Administration, the RAC is particularly well poised to have impact on a variety of top tier issues. The RAC's formidable ED was named to the White House Advisory Council on Faith-based and Neighborhood Partnerships. Moreover, the RAC is an increasingly important resource to the Conservative movement as they make strides to engage congregations in a more serious way in issues of social and economic justice.

Also on the national front, our support to the **Jewish Council for Public Affairs** advances their *Confronting Poverty Campaign*. This campaign is engaging the Jewish community in deep,

sustained, and coordinated anti-poverty service, activism, and advocacy. Its power rests in the leveraging of the stalwart infrastructure of Jewish Community Relations Councils (JCRCs) across the country – most of which are fairly integrated with their local Federations, traditional service providers for a variety of anti-poverty needs (food banks, cash assistance, low-income housing) – and helping them to take steps towards activism and advocacy. This campaign seeks to give agencies and communities the tools and resources needed to address poverty at a more systemic level.

Congregation-based Community Organizing (CBCO) is core to a Jewish social justice movement as it engages synagogues and Jews in ways that are simultaneously hands on and systemic, and is deeply rooted in congregational life and in real partnership with other communities of faith. We gave a grant, with Collaborative Initiatives, to the **Jewish Funds for Justice (JFSJ)** for the *Seminary Leadership Program and Congregation Based Community Organizing* to make public action, leadership development, and civic engagement a priority in the religious culture of American Jewish life. Congregation-based community organizing has taken hold in many more synagogues across the country and garnered considerable attention in the Jewish community. JFSJ is making a vital contribution to this movement through the Seminary Leadership Training Program – training and supervising rabbinic students from seven seminaries and changing the face of rabbinic education and in turn the rabbinate. They are building a generation of rabbis who understand the fundamental principles of organizing and, more importantly, have experience utilizing them. Also at the center of this growing movement is the **Jewish Communal Relations Councils of Greater Boston's Greater Boston Synagogue Organizing Project (GBSOP)**, which was granted support by the Jewish Life and Values program together with Collaborative Initiatives and the Health programs. The Boston JCRC is doing remarkable work engaging concentric circles of synagogues in CBCO and mobilizing thousands around critical issues of economic and social justice; they have played a particularly central role in advancing health care reform.

Talented community organizers who understand the nuances of the Jewish community have been identified as a critical factor in successful synagogue CBCO work. They are also hard to find. As such we awarded a grant to the **Jewish Organizing Initiative (JOI)** to help develop the next generation of Jewish community organizers. JOI remains the only organization with the sole purpose of cultivating, training, and mentoring Jewish community organizers.

Finally, in addition to an Affinity Grant for membership to the **Jewish Funders Network (JFN)**, we gave a grant to JFN for the *JFN Conference 2009 Environmental Impact Reduction*. Building on our efforts in 2008 to make the conference carbon-neutral through the purchase of offsets and RCIs, our support this year enabled JFN to expand its greening to include a significant reduction of paper, plastic, and other waste. These efforts also set the groundwork for future Jewish conferences and raised awareness about the importance of carbon neutrality among a powerful and well-connected network of philanthropists.

**Objective 2. INTERFAITH:** To promote interfaith coalitions that address issues of social and economic justice and amplify a progressive religious voice.

Together with Collaborative Initiatives, we gave general support to **Interfaith Worker Justice**

(IWJ), one of the cornerstone organizations engaging religious communities in campaigns to improve the salaries, working conditions, and healthcare of low-wage workers. After several years of support for the good work of IWJ, this was exit grant.

In continued efforts to build a more progressive religious voice in America, together with Arts & Culture and Collaborative Initiatives, we gave a renewal grant to **Auburn Theological Seminary** for *Auburn Media*. Auburn Media cultivates social justice and multi-faith understanding through the media and through identifying and training powerful religious voices. It is worth noting that there are exciting changes afoot at Auburn Theological Seminary (ATS), and Auburn Media has gone from being an experiment to a widely recognized lynchpin for all of Auburn's work. In fact, the newly appointed President of ATS is seeking to integrate Auburn Media into all Auburn programs and to position ATS to have a much more public and national robust voice.

We also joined several of the other NCF program areas in supporting inter-disciplinary initiatives. We joined Arts & Culture and Collaborative Initiatives in a grant to **State Voices** for the *Arts & Democracy Project*. This project aims to bridge community-based practitioners, including faith leaders, with those engaged in policy formation. We also joined Ecological Innovation, Arts & Culture, Health, and Collaborative Initiatives in grants to **WGBH Educational Foundation** for *Frontline/"Breaking The Bank"* and to the **Educational Broadcasting Corporation** for *NOW on PBS*. Both of these programs thoughtfully address the current economic crisis, one of the most critical ethical issues of our day.

Furthermore, we joined the Health Program in support to two significant interfaith community organizing efforts. *Massachusetts Health Care Reform Implementation Project*, an initiative of the **Greater Boston Interfaith Organization Sponsoring Committee, Inc. (GBIO)**, is a national model of both health care reform and effective organizing of communities of faith. GBIO works very closely with our grantee, the Boston Jewish Community Relations Council, sharing both strategy and staff resources. **PICO National Network's Cover All Families Campaign** is building a strong, educated faith constituency for a health care system that covers everyone, is affordable to families, and is fiscally sustainable. PICO works as a partner with other JLV congregation-based community organizing grantees, as they seek to engage more synagogues in the work of the national networks.

Finally, we joined Arts & Culture and Collaborative Initiatives in recommending a grant to **The International Coalition of Historic Site Museums of Conscience Sites of Conscience: U.S. Initiative** to support an effort to build the capacity of participating sites and support coordinated national responses to key contemporary social justice issues identified as urgent in their communities.

**Objective 3. ISRAEL:** To advance a more just and vibrant Israel by empowering women as agents of social change; building a cross-sector, values-based environmental movement; and supporting efforts in the United States to promote the peace process.

Together with Arts & Culture and Collaborative Initiatives we gave a grant to support **Just Vision, Inc.** to raise awareness among North American audiences about the range of grassroots

Palestinian and Israeli peace building efforts. Through film, curricula, workshops, and facilitator training, Just Vision is amplifying civilian initiatives that foster understanding, non-violence, and peaceful solutions to the conflict in the Middle East and is building a base for top down diplomatic efforts. Just Vision works quite closely with many of our other grantees advancing Middle East Peace and is a strategic complement to other policy, advocacy, educational, and grassroots efforts. High quality films and the outreach and education campaigns that accompany them are a powerful part of our strategy to affect the peace process in the Middle East through challenging Americans assumptions.

It is widely recognized by analysts and even government officials that there is a relatively short 18-24 month window in which to make significant progress towards a two-state solution. If not achieved during this period, the opportunity truly may be lost. Our multi-pronged strategy to advance the peace process from the States gathered momentum this year, as the United States geared up to play a greater role. Together with Collaborative Initiatives we awarded a general support grant to the **Israel Policy Forum (IPF)** to provide reasonable, sustainable, and forward-thinking solutions to a two-state resolution of the Israeli-Palestinian conflict to policymakers and the American Jewish community. Given the unique role that IPF plays — with officials, analysts, and dignitaries consistently looking to them for policy development, strategy, creative new ideas, and public Jewish backing — support for IPF could not have been timelier. Also, together with Collaborative Initiatives, we gave a grant to **Americans for Peace Now (APN)**. APN strives to educate the American Jewish community and general public about the strategic and economic benefits of peace between Israel and her neighbors. APN's work monitoring the settlements makes them a particularly valuable and timely resource, and their newest work developing social media is a critical step to engage younger Americans, a demographic too often disengaged from the discourse on the Middle East.

Also critical to enhancing America's role in the pursuit of Middle East peace is shifting American Jewish leaders' understanding of Palestine. To this end, we gave a grant to **FJC for ENCOUNTER**, an educational organization dedicated to providing Jewish Diaspora leaders from across the religious and political spectrum exposure to Palestinian life. ENCOUNTER has reached a real tipping point and is known, respected, and engaged by mainstream Jewish organizations and leaders — the very audience ENCOUNTER sets out to influence. At a time when intra-Jewish discourse on Israel has all but shut down and too often a monolithic and narrow view of Israel is asserted from the mainstream Jewish community, the work of ENCOUNTER is nothing short of critical.

With government and business influentials engaged by IPF, the general public and policy makers educated by APN, and Jewish leaders' assumptions challenged by ENCOUNTER, what remains are the grassroots and campus communities. Together with the Collaborative Initiatives, we awarded a grant to **Brit Tzedek v'Shalom (BTVS)** to build a grassroots Jewish movement advocating for greater U.S. commitment to resolving the Israeli-Palestinian conflict. BTVS is working to expand and strengthen its rabbinic network, deepen synagogue outreach, educate and advocate through trainings, coach chapter leaders, and hold public events. Since this grant was given, BTVS has merged with J Street, a move that offers BTVS a more robust platform and J Street deeper inroads into local communities. On the campus front, we gave a grant, with Collaborative Initiatives, to the **J Street Education Fund** for *J Street U* to provide college

students opportunities to advance peace in the Middle East and to engage in an alternative to extremist politics currently dominating campuses. In a quite natural marriage, J Street enveloped our grantee Union of Progressive Zionists (now J Street U). UPZ offered J Street a grassroots campus network while J Street provided this fledgling organization much needed infrastructure and stability.

All of these organizations – and many more – came together for the *Inaugural Conference* of the **J Street Education Fund**, for which we, together with Collaborative Initiatives, awarded a grant. The conference brought together numerous organizations and individuals committed to promoting U.S. diplomatic leadership to achieve peace and security for Israel and the Middle East. Conference attendees included policy makers and academics, community leaders, grassroots organizers and netroots activists, and Israeli and Arab thinkers and leaders. J Street secured the co-sponsorship of most of the pro-Israel, pro-peace organizations (no small feat) and with its media savvy, amplified the progressive American Jewish voice on Israel. Given the Administration's commitment to a two-state solution and the relatively short window of time during which real steps can be taken, the timing of this conference could not have been more significant.

In terms of our work in Israel itself, Environment and Collaborative Initiatives joined us in a grant to the **New Israel Fund (NIF)** for *Women and the Environment: Agents of Change in Israel*. We seek to create a more vibrant, just, and peaceful Israel through supporting women as agents of change, developing an environmental movement, and seizing opportunity to create cross-sector social change. In addition to our four initiatives: the NCF/NIF Women's Initiative; the Dafna Fund; the Green Environment Fund; and the NCF Opportunity Fund, we supported two new efforts. In an effort to further develop the field of Orthodox women (particularly among poor, Mizrahi, and ultra-Orthodox women as well as those living in the periphery), a fund was established to offer small grants to seed new initiatives. In contrast to the Orthodox community, where there is a relatively developed organizational infrastructure, the Palestinian-Israeli women's sector lacks many of the mechanisms for successful collaboration, networking, peer learning, and coordination. Together with Shatil we developed a field-building initiative that launched with a retreat for leaders in the field. (See Appendix A for a complete report of 2009 Israel grantmaking.) As we enter the fifth year of our funding strategy, we are also engaged in an assessment to determine how to most effectively advance the work in Israel going forward.

Finally, our work in the Palestinian-Israeli sector – through both our work to advance women as agents of change and to build a cross-sector environmental movement – would greatly benefit from more funding partners and American communal support. It is in this context that we, together with Collaborative Initiatives, renewed a grant to the **American Jewish Joint Distribution Committee, Inc.** for our membership in the *Inter-Agency Task Force on Israeli Arab Issues*.

## APPENDIX A

### *Women and the Environment: Agents of Change in Israel Grants 2009*

#### **NCF/NIF Women's Initiative Grants**

##### **Goal:**

To harness the energies of women as agents of change to advance the rights and improve the status of disempowered populations – including women – to create a more just and vibrant Israeli society.

##### **Strategies:**

Support and cultivate initiatives in the Orthodox Jewish and Palestinian-Israeli sectors – both cultures deeply rooted in tradition in which women are making meaningful change – that empower and mobilize women for effective social change through:

1. Leadership: Enhance the leadership capacities of women and develop effective contexts through which they can lead;
2. Advocacy: Protect and extend the rights of women; and
3. Collaborations and Cross-Sector Initiatives: Cultivate and advance efforts that cross populations and bring together unlikely partners to address common concerns, share knowledge and expertise, and engage in coordinated strategies.

##### **Criteria/Preferences:**

We also seek to support organizations, projects, or initiatives that:

- address the role of men in achieving these goals;
- effectively engage younger generations;
- work across generational lines; and
- seek to educate the public, change community understanding, and galvanize the media.

## **Adva Center**

### *Women's Budget Forum*

This project is a gender-based analysis of the state budget and changes thereto, to reveal the impacts on women. This initiative looks at women in general but also at particular populations, including Orthodox and Palestinian-Israeli women. Based on this analysis, Adva produced a report and disseminated it widely to the media, collaborating NGO's, Knesset members and high-level policy-makers. This grant also supported various additional publications related to the budget including economic stimulus programs, women's employment, issues of transportation, childcare, health services and employment, and public education.

## **Economic Empowerment for Women**

### *General Support*

Economic Empowerment for Women (EEW) works to reduce the social and economic gaps in Israel through the economic empowerment of low-income women. Participants in the economic empowerment courses represent various disenfranchised sectors of Israeli society: Palestinian Israeli, Ultra Orthodox, Mizrahi and immigrant women. EEW's successful models promoting economic empowerment for women as a means of breaking the cycle of poverty include business training courses, a loan fund, mentoring and technical assistance and consulting. This grant supported the organization's loan project, strengthening the organization's capacity to process applications and maximize funds to the field. This past year, EEW processed more than 110 loans, and ongoing evaluation shows continuing success of the funded enterprises.

## **Kolech: Religious Women's Forum**

### *General Support*

The main goal of Kolech is to improve the status of religious women in their respective communities by promoting fundamental reforms. Kolech aspires to do so through a consensual process of change from within the Orthodox community. Kolech is the only apolitical, nationwide organization dedicated to the advancement of women within the framework of Jewish law (*halacha*), and within the religiously observant Orthodox community. Kolech supports settings in which women can cultivate richer spiritual lives; advocates revising the halachic status of women by emphasizing their standing in the rabbinical courts; supports egalitarian educational frameworks; and works to increase the number of women political leaders in the religious community. Among other achievements, this year the organization's curriculum on gender equality, taught by 20 facilitators trained by Kolech and funded by the Ministry of Education, reached twice as many girls as in 2007.

## **Liberal Religious Education Project**

With the help of the NIF staff, this year Ne'eman Torah Va'Avodah initiated this project with the participation of Kolech, 12<sup>th</sup> of Heshvan and the Herzog Center. The project's aims are three-fold: to encourage young people from the National Religious sector with a liberal outlook to enter the teaching profession; to identify young veteran and new teachers (most of whom will be women) with leadership potential to serve as leaders in promoting a liberal Orthodox agenda in the State religious schools; and to enhance the liberal values of teachers in the State religious schools. With the support of this grant, the organization also hired project staff and recruited 17 participants from around the country to identify and create curricular materials on significant topics that have been under-addressed in the Orthodox community.

## **Ma'an: The Forum of Bedouin Women's Organizations**

### *General Support*

Ma'an was established to enable Bedouin women's organizations in the Negev to combine forces to address sensitive issues related to Bedouin society and women's status. The Forum has made significant progress in recent years through the establishment of the Bedouin Women's Rights Center in 2007, which provides counseling on personal status issues. The Male-Female Roundtables, held since 2007, continue to provide a unique framework in which men and women discuss the status of women in Bedouin society. NCF/NIF-WI funding also supported the Legal Advocacy Support Center to provide legal assistance to Bedouin women on personal status issues as well as debts, land ownership, and citizenship. Ma'an also offered lectures and courses for Bedouin women and girls on marital status issues, women's health, employment and – in collaboration with the Ministry of Health – offered programs for health workers on addressing violence within Bedouin society. Other activities included a yearlong Women's Leadership Course and the continued publication of the only Palestinian-Israeli language magazine written by and for Bedouin women; and printing and dissemination of posters and booklets with information on women's rights.

## **Ne'emanai Torah Va'Avodah**

### *General Support*

Ne'emanai Torah Va'Avodah (NTVA) is the leading progressive Orthodox organization. In recent years, they have expanded the scope of their activities to address the marginalization of women, the shortcomings of the State religious courts vis-à-vis life cycle ceremonies, and the growing conservatism in the State religious educational system. NTVA continues to operate a unique Orthodox Beit Midrash, *Re'im* (Companions). Open to both men and women, *Re'im* encourages mixed learning of men and women together.

## **Sidre**

### *Women's Community Center*

#### *General Support*

Sidre aims to improve the status of Bedouin women in the Negev in terms of their personal and socioeconomic level. The organization has served as a catalyst for the creation of women's centers that serve as the loci for the organization's wide range of empowerment programs for women. General support funds the operation and programming at the centers including lectures, reading and writing courses, training in micro-business and health education. The additional support enabled a group of graduates of the organization's women's empowerment program to establish a women's center in the Qasir Sir Community Center. The women's center runs literacy and continuing education programs for women. These programs provide significant advancement for the local women who have taken on leadership positions in running the Center.

## **Sot el-Amel: Laborer's Voice**

### *Women's Initiative*

Founded by residents of Nazareth, Sot el-Amel is a grassroots initiative that has become a regional organization addressing the employment and economic needs of the Palestinian-Israeli population in the North. The organization provides legal consultation and has filed several suits protecting the rights of women. Project support enabled the implementation of the organization's strategic decision to strengthen its work with Palestinian-Israeli women, reflected in the participation of women in its



leadership ranks (four women serving on the Executive Committee) and the establishment of the first Women's Initiative within the organization's programming. The Women's Initiative prepared special programming around International Women's Day and sponsored Grassroots Women's Leadership Training. This grant also enabled Sot el-Amel to provide legal counseling and advice to 1,500 individuals, many of them women, and disseminate publications on labor rights to more than 10,000 people. The Women's Initiative facilitated events on women's labor rights, provided services to women from five villages in the Galilee, and offered training in computer skills.

### **Sviva Tomechet: Supportive Environment**

#### *General Support*

Sviva Tomechet was founded in January 2003 by a group of successful businesswomen from the FSU and veteran Israeli women who sought to contribute some of their knowledge and experience to women from disadvantaged populations grappling with the difficulties of managing small businesses. The grant supported core activities of the organization including support groups and networking opportunities for Orthodox and Haredi women, and establishing connections between Jewish and Palestinian-Israeli women with similar needs, interests and goals. Of considerable mention: U.S. Secretary of State Hillary Clinton met with representatives of the organization during her March 2009 visit, and held up the work of the organization as a powerful example of multicultural coexistence in Israel.

### **Women Against Violence (WAV)**

#### *Women's Leadership project*

#### *Women's Employment Project*

The Women's Leadership Project was established to promote civil equality for Palestinian-Israeli women in Israel, give them representation in decision-making forums (in both the public and political arenas), and promote issues relating to their status in decision-making forums. This year, the project aimed to maximize its gains from previous years and focused on its commitments to further women in leadership roles, hold regular meetings with men, and recruit new women leaders. In 2009, the project achieved a renewed commitment from the head of the High Follow-Up Committee for Palestinian-Israeli Citizens in Israel, Muhammad Ziedan, to carry out its decision to raise women's representation in its secretariat.

WAV established the Women and Employment Project to address the disproportionately low employment rate among Palestinian-Israeli women, particularly those holding university degrees. The project aims to reduce or eliminate the barriers that have impeded Palestinian-Israeli women's ability to penetrate the job market. Among other achievements, a training course for Palestinian-Israeli women was launched in 2009, preparing women for work as court reporters, as a first step in supplying these women with the means to enter this field of work. The course is a result of WAV's persistent and continuous work with the State Services Legation, the Courts Administration, and the Ministry Industry Trade and Labor.

### **Working Group for Equality in Personal Status Issues**

#### *General Support*

The Working Group is a coalition (including ACRI, Kayan, the Israel Women's Network, Women Against Violence, and the Al-Tufula Center - Nazareth) working to promote the rights of Palestinian-Israeli women by securing enforcement of current law (e.g. giving Palestinian-Israeli women rights equal to Jews to take divorce-alimony-custody issues to family rather than religious courts); by

improving women's treatment in religious courts; by advocating for increased budgets to add court services for women; by strengthening legislation (e.g. raising legal age of marriage from 17 to 18, the current age of majority in Israel, that would allow Palestinian-Israeli girls to finish high school); and by building general public awareness of Palestinian-Israeli women's issues through lectures, workshops, publications, and media outreach. The coalition coordinates the operations of Courtroom Stations in Haifa and Nazareth, provides materials on women's legal rights and legal options; and guides women through legal procedures. In addition, the organization undertook a major information campaign in 2009 (aimed both at Palestinian-Israeli women and social workers working with this population) based on the 2008 publication "A Guide to Personal Status Issues," a document addressing women's status issues, with a focus on polygamy.

### **Yud Bet B'Heshvan (12<sup>th</sup> of Heshvan)**

#### *General Support*

The organization was established in 2006 by a group of National Religious parents in Rehovot that had been involved in creating local liberal educational institutions for 15 years. Their main goal has been to develop educational frameworks, both formal and informal, within the National Religious sector that promote a liberal, democratic, and modern worldview. They succeeded in establishing a liberal yeshiva high school for boys in Rehovot, which recently received official recognition from the Ministry of Education. In November 2007, they opened a *midrasha* associated with the Pelech High School in Kiryat Ekron (Pelech is a network of liberal Orthodox high schools for girls). 12<sup>th</sup> of Heshvan has also provided intensive guidance and consulting to a group of parents in Zichron Ya'akov who just this year opened a local Pelech School.

### **Field Building Initiatives Emerging from the Research:**

#### *The Special Pool For Orthodox Women*

#### ***The Crisis Center for Religious Women (CCRW)***

This grant supports a course that trains Orthodox men to facilitate women's rights and status workshops for Orthodox men and boys. The Crisis Center's core teaching corps, up until this point, was comprised of only women who, because of cultural restrictions within the Orthodox community, had very limited access to the male population. This new initiative is a critical step towards raising awareness and changing behavior around these issues for the broader Orthodox community.

***Kolech's Northern Chapter***

This grant provides the salary for a quarter-time coordinator at the Northern Chapter to facilitate workshops, study sessions, and empowerment workshops on issues of feminism and women in Orthodoxy. The chapter is one of ten within or affiliated with Kolech. Funding for this position is critical to enable the Northern chapter's work.

***Midreshet Be'er***

This planning grant to Midreshet Be'er community college for religious women supports the development of a teachers' training program. The program aims to train teachers who will bring more progressive voices to the country's religious teaching community.

***Dafna Horev***

This grant supported the second year of an intergenerational Beit Midrash for Mizrahi women. As with the pilot, all programming will be documented, published and disseminated to facilitate replication.

***Hila Mishali***

This grant enabled Mishali to train facilitators to create and lead Rosh Chodesh groups for religious Mizrahi women.

***Mira Menashe***

This grant supported Menashe's classes in English and household budgeting for Mizrahi women and girls in the Pardes Katz neighborhood of Bene Beraq.

***Sonia Sudri***

This grant enabled the set up of a video-editing facility at an advanced school for the stage and cinema arts for Ultra-Orthodox women.



## **The Dafna Fund**

The Dafna Fund (DF) – formerly known as the Dafna Israeli Fund – complements the work of the NCF/NIF Women's Initiative as it seeks to develop feminist leadership by supporting new initiatives in three fields: academia, business, and public participation. Projects of The Dafna Fund seek to:

- mainstream feminist philosophy and practices;
- foster innovation; and
- create working partnerships between feminist and social change organizations and academic institutions.

All projects include serious inter-organizational partnerships between feminist and mainstream institutions and focus on mentoring, networking, and diversity as key to developing feminist leadership.

### *Achoti*

#### **Working Together to Create a Feminist Economy**

##### *Joint Project with Comme Il Faut*

Over the past three years, this project has developed a unique model for employment and business, focused on cooperation among women from diverse professional, cultural, social, and economic backgrounds: Ethiopian women who produce handicrafts and textiles at the Rikmah Center in Kiryat Gat; Mizrahi women from the Achoti movement; and businesswomen from the Comme Il Faut fashion company. This cooperation aims to enhance the business and professional abilities of the Ethiopian women in handicrafts, fashion, and marketing and to facilitate personal and group networking among women of different backgrounds.

The project has also grown to include Bedouin women from the Negev and Palestinian-Israelis from the al-Azarya village near Jerusalem. This year, as the participants developed deeper relationships with each other, they collectively decided to open a fair-trade store to sell the products of the women's organizations (supported in part by the Miami Federation). The store opened in Tel Aviv in June 2009. This development embodies the Dafna Fund's mission to facilitate relationships among underserved Israeli women to leverage their resources and knowledge.

### **Itach**

##### *Project in Partnership with Itach: Lawyers for Social Justice & Haifa University*

Through the Legal Leaders Training Program, Itach – in partnership with the Haifa University Law Faculty – has succeeded in creating a cutting-edge model of an academia-community partnership. Bringing together grassroots activists from underserved communities and students from the university, the project has reached a new level of maturity and sustainability. Itach's model integrates networking, diversity, and mentoring. The intensive and direct encounter between the students and the local activists provided a significant opportunity both for mutual learning and for networking among people of various social backgrounds, ethnic groups, and age groups. Following semester-long training programs, the students and local activists form small groups to implement social change projects – initiated by the women Legal Leaders – with mentoring from the project's staff. This year, the third

cohort of participants began implementing new projects, or joined existing ones, to help strengthen their community base and structure. The projects address cutting-edge issues among women in traditional societies and in marginalized communities, such as: higher education among Druze women, family honor killings, rehabilitation from prostitution (a problem prominent among women from the former Soviet Union), the rights of divorced Palestinian-Israeli women who are victims of violence, and the rights of women who are handicapped.

An external evaluation of this “academic-community partnership” praised Itach for providing such significant educational experience. This past year, in an effort to share the model, Itach conducted its first conference at the Tel-Aviv University.

### **Kolech**

Kolech has contributed significantly to the growing community of Orthodox women activists. Kolech shifted from partnering its mentorship program with an academic institution (most recently with the Rackman Center for Bar-Ilan) to partnering with a mainstream Orthodox women’s organization in an effort to more effectively reach and impact Orthodox Jewish women. This year’s new cohort cycle has been launched in partnership with Emunah, a major mainstream Orthodox women organization.

### **The Women’s Political Center**

The Center is a new and unique project advancing the participation of women in public life. This one-year strategic planning grant, in partnership with the Van Leer Institute, is still in its early stages. The Center is envisioned as a think tank that will combine research and proposals for policy change with coalition building and political advocacy.

### **The Working Group for Equality in Personal Status Issues**

This project is the outgrowth of Itach’s Legal Leaders Program. A graduate of the first Legal Leaders class established this project and enlisted more than 20 active volunteers to staff the two courtroom stations set up in Haifa and Nazareth. The courtroom stations provide legal counsel for women involved in personal status cases often dealing with custody disputes and domestic violence. The Working Group adopted the project with great excitement and provides its coordinator (a divorced woman who herself was the victim of her former husband’s violent abuse) with ongoing professional training. The two stations work to raise the awareness of Palestinian-Israeli women of their rights in matters of divorce, particularly when there was domestic violence. In April, the board of the Dafna Fund determined that the project deserved close and special supervision, and approved a six-month grant. The DF staff works closely with project’s leadership to develop a strategic plan for further development and sustainability.

### **The Dafna Fund Small Grants Pool**

In order both to respond to the new challenges of the economic crisis and maintain this commitment to identifying and nurturing new activists in the field, the Dafna Fund issued a Request for Proposal for a small grants pool to be launched at the end of the year. Grants sizes will approximate \$2,000- \$5,000 to a total allocation of \$54,000.

The fund will consider proposals for short term, ad-hoc projects and campaigns designed to promote 1) public discourse on the effect of the state budget and the labor market on women, 2) women’s

participation and representation in the media, in political leadership and the peace process, or 3) other issues consistent with the ongoing emphases of the Fund.

The Dafna Fund will consider proposals from diverse inter-organizational partnerships between feminist organizations, social change organizations and mainstream institutions, working in full partnership and inclusion of women of diverse backgrounds and communities. Preference will be given to ad-hoc projects focusing on media campaigns, public education and advocacy for policy reform.



## **The Green Environment Fund (GEF)**

The Green Environment Fund (GEF) seeks to build a values-based environmental movement in Israel, foster a sustainable environment, and safeguard the public health of all Israeli citizens. GEF promotes environmental justice, with an emphasis on the health of vulnerable populations, safeguarding water and air quality, and effective partnerships especially between Jews and Palestinian-Israelis.

### **Goal #I:**

To prevent environmental degradation and to preserve dwindling natural resources, within the context of the wider social issues, such as health, public participation, welfare, quality of life.

Objective 1: To thwart encroachment on open spaces

Objective 2: To protect and rehabilitate Israel's water resources

Objective 3: To preserve and protect air quality

### **Goal #II:**

To promote a strong and professional environmental movement, that acts on behalf of and together with all of Israel's citizens, including the most vulnerable ones

Objective 1: To support nongovernmental organizations that, on the one hand, strive towards excellence in implementing high-quality, effective programs and, on the other hand, coordinate and cooperate with one another and with the public to form a strong environmental movement

Objective 2: To raise public awareness and strengthen public education about the impact of environmental degradation, particularly on public health, social justice, and quality of life, so that the public can become actively involved in planning and decision-making

### **Strategies**

GEF builds the capacity of the environmental movement by providing financial assistance, technical assistance and professional guidance and oversight to grassroots and other organizations.

GEF promotes the development of a highly diversified environmental movement by supporting a wide range of grantees - from well-established, nationwide organizations to small, start-up organizations.

GEF encourages coalition-building and joint campaigns to enhance the effectiveness of individual organizations and the environmental movement as a whole.

GEF strives to include environmental justice as an element of every project and activity it supports.

GEF boosts public awareness and activism by supporting organizations that work in formal and informal educational settings.

### **Palestinian-Israeli Center for Alternative Planning (ACAP)**

#### *Environmental Justice and Sustainability Process*

ACAP was established in December 2000. Since then, it has developed into a national address that represents the interests of Palestinian-Israelis on issues of housing, planning, infrastructure, employment, transportation, social services, education, and environment. ACAP seeks to participate in the decision-making stage of municipal plans in order to most effectively limit environmental damage in Palestinian-Israeli localities.

### **Citizens for the Environment (CFE)**

#### *Sustainable Industry in the Galilee*

CFE was founded in 1990 by Jewish and Palestinian Israelis in the Western Galilee to monitor the region's pollution levels and identify its impact on the health and well-being of the local population. Sustainable Industry in the Galilee monitors the polluting industries and production processes that can be harmful to the environment and its inhabitants and promotes sustainable economic development for the region.

### **Green Course**

#### *General Support*

Green Course is Israel's largest environmental volunteer organization, with over 6,000 student volunteers in 26 chapters on campuses across Israel. On the national level, Green Course focuses primarily on air pollution, sustainable energy and public transportation. The organization's activities include media campaigns, outreach, education, advocacy and engaging the Green Course Alumni network. Green Course is expanding and developing its activities and volunteer network across Israel.

### **The Green Environment Fund**

#### *The Environmental-Social Entrepreneurs Fellowship Program*

The Environmental-Social Entrepreneurs Fellowship matches business executive, venture capital or high tech entrepreneur philanthropists from the United States and Israel with promising social entrepreneurs to develop scalable, systemic solutions to the social, educational and employment crises in Israel. GEF launched this fellowship based on research that suggests that engaging both individuals and organizations is an effective strategy to furthering environmental change and strengthening civil society more broadly. This grant supported Adi Barson to expand his Pilot for Young Green Network Kindergarten Environmental Education to over 40 kindergartens.

### **Green Network (Reshet Yeruka)**

#### *General Support*

Over the past 10 years, the Green Network (GN) has worked to set the tone for change in the environmental movement in Israel, spearheading innovative programs and alternative educational models, while challenging and supporting schools to tackle local and global environmental issues. With GEF's support, the Green Network has grown from nine schools in 1998 to include over 200 schools in 30 local community networks. Among many projects, this grant supported the GN to create a cadre of flagship schools; open a Virtual Education for Sustainability Resource Center; work with a wider



diversity of age groups; and further develop the Green Network in the Palestinian-Israeli and Ultra-Orthodox sectors.

### ***Hatikva - Al Amal Association for the Advancement of Culture***

#### ***Sha'ab***

Hatikva Al Amal has formed core groups for communal environmental action in three Palestinian-Israeli villages, improving community involvement on issues of environment, education and women's status. This Jewish-Palestinian-Israeli organization has initiated the establishment of an environmental coalition of 13 local Jewish and Palestinian-Israeli organizations in the Galilee (Coalition for the Shagur Stream).

### **The Heschel Center Environmental Learning and Leadership**

#### ***General Support***

The Heschel Center brings together people and ideas to develop and realize a vision of a sustainable society in Israel through capacity-building, education and leadership development. GEF's general support grant enabled the Heschel Center to continue its work to: implement innovative and effective initiatives; recruit and foster agents of change in key positions; identify and activate areas within Israeli society with the potential to effect significant change and sustainable practices; foster collaboration between individuals and overlapping projects; and create implementation models for joint work.

### **The Heschel Center Environmental Learning and Leadership**

#### ***Maof Leadership Seminars***

The Heschel Center brings together people and ideas to develop and realize a vision of a sustainable society in Israel. A leader in its field, the Heschel Center cultivates new social-environmental innovators and "early adopters," expanding and augmenting its network of agents of change. Since 1998, the Maof Seminars have played an important role in strengthening and enhancing the Israeli environmental movement, establishing the Heschel Center's key function as a facilitator and catalyst for effective examination and formulation of ideas, goals and strategy. This grant supported two shortened Maof seminars (two-days), one aimed at new Local Sustainability Advocates and the other for the senior leadership of the environmental movement.

### **Israel Bicycle Association (IBA)**

#### ***Support and Consultation Center for Bicycling Infrastructure***

IBA promotes cycling as a major means of transportation within towns and cities with the aim to reduce social disparities and improve quality of life, the environment, public health, and road safety. IBA is in the process of initiating a Support and Consultation Center for Bicycling Infrastructure, which will address the present shortage of integrative professional know-how on issues related to cycling infrastructure.

### **The Israel Energy Forum**

#### ***Israel Energy Forum***

The Forum aims to develop a sustainable energy policy for Israel, advocate for its adoption and enable its implementation. Its aim is to bring together experts, decision-makers, NGOs, government agencies and other relevant bodies to a roundtable in order to promote the implementation of a sustainable energy plan on a practical level. Although this is a fairly new initiative, the forum aims to create a

knowledge base, public awareness and political will to make the shift towards sustainable energy policy.

### **Israel Union for Environmental Defense (IUED)**

#### *The Community and Environment Project*

IUED pursues a vigorous agenda of strategically focused projects in four key areas: air pollution prevention, safety of drinking water, solid waste management, and accessible open spaces. IUED is Israel's leader in building a sound legislative and regulatory basis for environmental protection. The Community and Environment Project is the central address for anyone seeking redress for environmental hazards and threats. Individuals, house committees, neighborhood watches and community groups turn to IUED about community environmental issues as well as issues regarding the law and legal rights. This project also tries to reduce bureaucratic obstacles by getting local authorities or other bodies to address threats to the environment.

### **Israel Union for Environmental Defense (IUED)**

#### *Clean Air Now*

Clean Air Now aims to improve air quality and reduce public health risks from air pollution through implementation of the recently passed legislation, targeted legal interventions, and policy reforms.

### **Israel Union for Environmental Defense (IUED)**

#### *Enforcing Environmental Laws Project*

The lack of adequate enforcement of environmental laws in Israel is one of the most pressing challenges for the movement. A substantive environmental enforcement authority with expertise in environmental law—an entity that exists in most western countries—simply does not exist in Israel. This past year, support from GEF for the Enforcing Environmental Laws Project, enabled IUED to survey the range of obstacles that have hindered environmental enforcement in Israel, research enforcement models in the U.S., E.U. and beyond, and evaluate the potential application of these models to Israel. Based on this research, IUED is preparing proposals with pragmatic solutions to address Israel's enforcement problems.

### **Movement for Israeli Urbanism (MIU)**

#### *Sustainable Development for City Mayors Program*

The MIU strives to improve the quality of urban life in Israel and actively promotes the development of sustainable and humane urban environments in Israel. MIU has more than 500 members from the private sector, government offices and other NGOs. With its Sustainable Development for City Mayors Program, MIU aims to increase awareness of urban sustainable planning and provide professional knowledge and tools for sustainable urban renewal to equip mayors and their teams to reduce suburbanization and sprawl.

### **SHATIL**

#### *Environmental Justice*

SHATIL's Environmental Justice Project provides essential capacity-building services to grassroots and national organizations combating environmental justice issues. SHATIL provides consultation to more than 30 environmental organizations throughout the country with cutting-edge capacity-building tools; extends outreach and follow-up to organizations and community groups in the North and the Negev; and offers coordination and consultation to environmental forums and coalitions.

## **Sheli Fund**

### *Grants for Grassroots Organizations*

The Sheli Fund provides emerging environmental grassroots organizations with an infusion of funding in their earliest stages of mobilization. Sheli Fund support has been critical to young grassroots organizations. Beneficiaries of Sheli funding represent the breadth of Israel's geographic and socio-economic diversity. In addition to the financial support, Sheli Fund grantees are also provided with capacity building from SHATIL and tools to elevate their understanding of local planning and development and professional legal consultation. There is also a professional pro bono center aimed to increase the level of professionalism among the environmental action.

## **The Society for the Protection of Nature in Israel (SPNI)**

### *Be'er Sheva Center for Community Environmental Action*

SPNI has been dedicated to conserving the integrity and diversity of Israel's natural, environmental and historical sites since it was established in 1953. Their programs raise public awareness, encourage direct citizen involvement, influence decision-makers, advocate environmental legislation, develop community leaders, protect wildlife and preserve open spaces. In just four years, SPNI Be'er Sheva has engaged thousands of children and hundreds of adults in a variety of environmental activities and has become a leading force in the environmental movement.

## **The Society for the Protection of Nature in Israel (SPNI)**

### *Derech Haifa Coalition*

Derech Haifa Coalition is a coalition of 16 groups working in diverse neighborhoods of Haifa to improve the quality of life in the city and advocate for more environmentally-sound urban development.

## **The Society for the Protection of Nature in Israel (SPNI)**

### *The Coalition for Promoting Environmental Policy for the Israeli Water Sector*

After years of catastrophic management of the water resources in Israel, SPNI is gathering a coalition of organizations to present recommendations for a more constructive approach to the water economy and to persuade Israel's leaders to adopt these recommendations.

## **The Society for the Protection of Nature in Israel (SPNI)**

### *Tel Aviv Center for Environment Action*

Tel Aviv Center for Environment Action is leading and coordinating the environmental movement in Tel Aviv-Jaffa. This year, SPNI Tel Aviv continued to engage in and conduct community educational environmental activities and is working to create a strong urban environmental movement influencing the urban agenda.

## **The Society for the Protection of Nature in Israel (SPNI)**

### *Sustainable Jerusalem Coalition*

In its twelfth year, Sustainable Jerusalem Coalition proactively asserts public pressure on issues of urban environmentalism and seeks to affect change within the city that impact Jerusalem and other urban environmental initiatives throughout the country.

## **Transport Today and Tomorrow**

### *Transport Vision for the State of Israel*

TTT was founded in order to encourage the development of alternative transportation systems. TTT's work focuses on research, publishing professional articles, advocacy on the national and local levels, and programs that encourage the use of public transportation as an alternative to private vehicles. Green Course is Israel's largest environmental volunteer organization, with over 6,000 student volunteers in 26 chapters on campuses across Israel. These two organizations have collaborated on Transport Vision for the State of Israel, a project that aims to deepen the public debate in Israel on sustainable transport, expose decision makers to new ideas in the field, and advocate for operative plans for a more sustainable transportation system.



## **NCF Opportunity Fund**

The mission of the NCF Opportunity Fund is to support and build capacity for cross-sector initiatives and coalitions that address broad issues in Israeli society in particularly far-reaching and innovative ways, responsive to history. The NCF Opportunity Fund aims to affect systemic change in ways that are reflective of immediate and changing realities on the ground.

### **Agenda – Israel’s Strategic Communications Center**

#### *General Support*

Agenda works for social and conceptual change in the Israeli media. Agenda aims to impact the way social change issues are presented in the media and to help organizations working for social change promote their goals more effectively. Agenda’s three-tiered strategy includes: 1) engaging in direct media outreach with Israel’s various media outlets to reframe the discourse on social justice issues; 2) providing strategic tools, training opportunities, and consultation services to improve the media capacity of NGOs; and 3) serving as a key informational center via comprehensive targeted monitoring of the different media outlets and research. “Reprioritizing of Minority Groups in the Media,” Agenda’s campaign to change the face of the Palestinian-Israelis in the media has been gaining traction. With top-notch trainings, Agenda has made significant inroads into the mainstream media including IDF Radio and Ynet, Israel’s leading online news portal.

### **Hebrew University of Jerusalem, Academy – Community Partnership for Social Change**

#### *Training Students to Become Leaders for Social Change*

The Community Partnership for social change implements seminars for student activists, runs a graduate program for student leaders committed to social change, and holds an annual conference of faculty members, student activists, and NGOs. The goal of the Academy-Community Partnership for Social Change is to provide students with open and inspiring settings for conceptualizing pressing social issues in terms of human rights and social justice, offer knowledge and tools to advance social change, and enable opportunities for the creation of networks and associations among engaged students and organizations. The program also aims to strengthen social change and human rights organizations through long-term engagement of students. All programs integrate theoretical knowledge, knowledge from the field, and practical tools for change and combine facilitation from experienced student activists, representatives of social change organizations, and faculty members. The collaboration and impressive model has already proved itself an effective mechanism to develop emerging young social change leaders and to strengthen the NGO sector.

Seminars conducted this past year successfully balanced student empowerment, peer learning, introduced many new students and faculty members to the work of social change, and enabled engagement across populations and methodologies usually quite segregated: Palestinian-Israeli/Jewish; rich/poor; sabras/new immigrants; center/periphery; academia/NGO sector; service/advocacy; and theory/practice. The program has grown iteratively as student activists initiated new community projects based on needs identified at the previous year’s national conference; recognition of the Israeli Council of Higher Education has ensured the continued operation of the community-engaged courses; and the presence of recent graduates now working at local NGOs has further deepened the relationships between universities, current students, and communities.

## **Ir Amim**

### *Advocating for More Equitable and Sustainable Policy*

Ir Amim is expanding its policy advocacy activities in an effort to make Jerusalem in the short run, more equitable and livable for both nations that share it. In the long run, Ir Amim seeks to influence Israeli policy such that it enables both peoples to reach an agreement about the future of Jerusalem, rather than creating irreversible facts on the other group, which preclude future reconciliation. The major methods of this project involve building Ir Amim's 2-way channels of communication with those administrative and political bodies making and implementing Israeli policy in East Jerusalem. These include national and local government, quasi-governmental authorities, and other key stakeholders. Despite the challenging political climate (including a political system in turmoil because of investigations into PM Olmert's suspected involvement in corruption), Ir Amim succeeded this year in building new relationships (with local and district planners, municipal leaders, and the State Comptroller's Office); issuing policy papers (one on the Palestinian-Israeli-Palestinian education system in East Jerusalem and one on post-Annapolis good faith negotiations); and affecting some policies on the ground (i.e. freedom of movement on new roads). Ir Amim also continues to monitor and advocate for many issues yet to be resolved and are a dogged and consistent presence around issues critical to the future of Jerusalem.

Ir Amim succeeded in directly reaching almost 10,000 Israelis and key international diplomats and journalists through study tours and targeted mailings and tens of thousands more through public relations media campaigns and their website. They also have developed stable partnerships with the Peace and Democracy Forum and Al-Nayzak, two Palestinian NGOs seeking to strengthen grassroots infrastructure.



# *Collaborative Initiatives for Social and Economic Justice*

2009

## **INTRODUCTION**

2009 marked the first year of the Nathan Cummings Foundation's Collaborative Initiatives for Social and Economic Justice (CI). Formally known as Interprogram for Social and Economic Justice (for seven years), CI operates in partnership with the Foundation's five core programs (Arts and Culture, Contemplative Practice, Ecological Innovation, Health, and Jewish Life and Values) to augment their impact through collaboration and strategic focus. The CI guidelines, newly launched and implemented in January 2009, provide a mechanism for encouraging strong coordination and leveraging between all the Foundation's program areas in order to address challenges in a coherent, strategic, timely, and integrated way.

The Foundation promotes collaboration and integrated innovative approaches among its programs by supporting initiatives that foster socially just and sustainable communities through institutional accountability and alliance building. CI grant funds are specifically dedicated for initiatives that meet at least one objective of one of the five core programs—although the more programs and objectives, the better—and that also (1) foster collaboration between the Foundation's program areas; and/or (2) promote institutional accountability through public policies or other approaches that ensure corporations, government and other institutions take responsibility for the real risks and costs of their activities, becoming agents for positive social change; and/or (3) build crosscutting alliances that support systemic or institutional solutions while creating the social basis needed for their implementation.

Additionally, Collaborative Initiatives is especially focused on facilitating NCF programmatic responses to the strategic opportunities that are created by the current economic and political context (i.e.: a “green” stimulus package, domestic support for the Middle East peace process, new governmental health care programs, new governmental arts programs, and so on); and, NCF proxy efforts and shareholder activities that aligned with the objectives of our program areas; and addressing the aftermath of Katrina.

In 2009, Collaborative Initiatives participated in a total of 93 grants: 79 were programmatic grants and Presidential Authority Grants (PAGs), and 14 were affinity groups and membership grants. Of the 79 programmatic and PAG grants, 50 grants were made with Collaborative Initiatives in conjunction with one other program area; 27 grants were made with Collaborative Initiatives in conjunction with two other program areas; and 2 grants were made with Collaborative Initiatives in conjunction with four other programs.

Collaborative Initiatives also supported 14 affinity and organizational membership grants. Six of these organizations have the potential to address relevant issues at the national level such as foundation payout requirements, excise tax, the estate tax, nonprofit governance and accountability, advocacy and broad civic engagement within the nonprofit and philanthropy

sector. These include: the **Center for Lobbying in the Public Interest**, the **Council on Foundations, Inc.**, the **Foundation Center, Independent Sector**, the **National Center for Family Philanthropy, Inc.**, and the **National Committee for Responsive Philanthropy**. The Foundation also participates in regional forums, conferences and events sponsored by the **New York Regional Association of Grantmakers Inc.** (currently known as **Philanthropy New York Inc.**) and the **Nonprofit Coordinating Committee of New York, Inc.** Six of the affinity grants—**Asian American-Pacific Islanders in Philanthropy**, **Association of Black Foundation Executives, Inc.**, **Disability Funders Network**, **First Nations Development Institute**, **Hispanics in Philanthropy**, and **Native Americans in Philanthropy**—were made to organizations that address issues relevant to NCF program areas.

## ACHIEVING COLLABORATIVE INITIATIVES' GOALS AND OBJECTIVES

Listed below are the 2009 Collaborative Initiatives grantees in four tables that divide them under the following rubrics: (1) Collaboration / Institutional Accountability / Crosscutting Alliance Building, (2) Strategic Opportunities Created by Political and Economic Context, (3) Shareholder Activities which describes efforts that are aligned with the objectives of our core programs, (4) Gulf Coast / Katrina Related Efforts which lists Collaborative Initiatives' continued support to help address, in an integrated way, the social, economic, environmental justice, environmental sustainability, health, and development issues of the Gulf Coast rebuilding effort, and (5) Affinity and Organizational Membership grants.

**Table I – Collaboration / Institutional Accountability / Crosscutting Alliance Building**

<b>Organization/Collaborators</b>	<b>Project Name</b>	<b>Collaborative Initiatives Relevance</b>
<b>American Jewish World Service, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Group Leadership Training Program</i>	<ul style="list-style-type: none"> <li>• Developed a training course that integrated AJWS's expertise and experience to create standards and assure the availability of a cadre of qualified leaders for Jewish service programs.</li> </ul>
<b>Architects/Designers/Planners for Social Responsibility, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Arts &amp; Culture</b></li> <li>• <b>Ecological Innovation</b></li> </ul>	<i>New Village Press</i>	<ul style="list-style-type: none"> <li>• Supported the publication of books that advanced the understanding of the impact of the arts on social justice issues.</li> </ul>
<b>Auburn Theological Seminary</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> <li>• <b>Arts &amp; Culture</b></li> </ul>	<i>Auburn Media</i>	<ul style="list-style-type: none"> <li>• Fostered social justice and multi-faith understanding through the media.</li> </ul>
<b>Backbone Campaign</b> <ul style="list-style-type: none"> <li>• <b>Arts &amp; Culture</b></li> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Procession for the Future 2010 Tour</i>	<ul style="list-style-type: none"> <li>• Supported a nationwide education and activism tour of the United States that strategically used creative tools to galvanize citizen aspirations and actions for peace, human dignity, and environmental sustainability.</li> </ul>



<b>Center for American Progress</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Campus Progress</i>	<ul style="list-style-type: none"> <li>• Supported a program using activism, journalism and cultural programs that trained young people to be heard on issues, and to engage, train and network a new generation of leaders.</li> </ul>
<b>Center for Labor and Community Research</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>Chicago Manufacturing Renaissance Council</i>	<ul style="list-style-type: none"> <li>• Developed and implemented the steps necessary to successfully build an economy that is economically, socially, and environmentally sustainable and benefits all of its residents.</li> </ul>
<b>Center for Rural Strategies, Inc.</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Daily Yonder</i>	<ul style="list-style-type: none"> <li>• Established a national voice for rural advocacy, activism and community engagement.</li> </ul>
<b>Center for Urban Pedagogy, Inc.</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> <li>• Ecological Innovation</li> </ul>	<i>Making Policy Public/ Envisioning Development Toolkit</i>	<ul style="list-style-type: none"> <li>• Produced socially engaged design and media projects as well as a series of portable learning tools that helped urban residents shape the development of their neighborhoods.</li> </ul>
<b>Center on Policy Initiatives</b> <ul style="list-style-type: none"> <li>• Health</li> <li>• Ecological Innovation</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported work that helped transform San Diego into a healthy community with full family health care, quality jobs, and a cleaner environment.</li> </ul>
<b>Cloud Institute for Sustainability Education</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> <li>• Ecological Innovation</li> </ul>	<i>SoL Education Partnership</i>	<ul style="list-style-type: none"> <li>• Supported a national learning cohort of schools and communities that planned for a sustainable future and created systemic change.</li> </ul>
<b>Craft Emergency Relief Fund (PAG)</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>General Operations</i>	<ul style="list-style-type: none"> <li>• Supported a cross-disciplinary task force committed to a strategy of resource development, educational empowerment and public policy advocacy that worked to ensure that there is a safety net for artists and arts organizations during and after disasters.</li> </ul>
<b>Environmental Health Coalition</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>Green Energy and Good Jobs Campaign</i>	<ul style="list-style-type: none"> <li>• Supported a project that reduced carbon emissions, promoted sustainable energy in EJ communities, and fostered a green economy in the San Diego Region.</li> </ul>

<b>Friends of the Highline, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Arts &amp; Culture</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Built and maintained an extraordinary public park that re-purposed industrial infrastructure as urban ecological amenity.</li> </ul>
<b>Front Range Economic Strategy Center</b> <ul style="list-style-type: none"> <li>• Health</li> <li>• Ecological Innovation</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Promoted responsible community-centered development that protected the health and welfare of low-income workers and communities in the Denver metropolitan region.</li> </ul>
<b>Government Accountability Project, Inc.</b> <ul style="list-style-type: none"> <li>• Health</li> <li>• Ecological Innovation</li> </ul>	<i>Environment and Health Campaigns</i>	<ul style="list-style-type: none"> <li>• Promoted government and corporate accountability by defending whistleblowers, advancing free speech, and empowering citizen activists on matters affecting human health and the environment.</li> </ul>
<b>Greater Boston Interfaith Organization Sponsoring Committee, Inc.</b> <ul style="list-style-type: none"> <li>• Health</li> <li>• Jewish Life and Values</li> </ul>	<i>Massachusetts Health Care Reform Implementation Project</i>	<ul style="list-style-type: none"> <li>• Ensured implementation of health reform in Massachusetts that served the needs of low and moderate-income residents of the state.</li> </ul>
<b>Herndon Alliance</b> <ul style="list-style-type: none"> <li>• Health</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported a national coalition of nearly 200 minority, faith, advocacy, business, labor, and provider organizations that worked on the state and national levels to ensure guaranteed, affordable healthcare for all.</li> </ul>
<b>Information Technology And Innovation Foundation</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> </ul>	<i>Driving Green Innovation Policy through “Innovation Economics”</i>	<ul style="list-style-type: none"> <li>• Supported a project that generated reports, articles, op-eds, events, convenings and gatherings of experts and stakeholders to drive the importance of addressing the challenge of global warming from an “innovation economics” perspective.</li> </ul>
<b>Interfaith Worker Justice</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Engaged religious communities in campaigns that improved the salaries, working conditions, and healthcare of low-wage workers.</li> </ul>

<b>The International Coalition of Historic Site Museums of Conscience</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> <li>• Jewish Life and Values</li> </ul>	<i>Sites of Conscience: U.S. Initiatives</i>	<ul style="list-style-type: none"> <li>• Supported an effort to build the capacity of participating sites and supported coordinated national response to key contemporary social justice issues identified as urgent in their communities.</li> </ul>
<b>Jewish Community Relations Council of Greater Boston</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> <li>• Health</li> </ul>	<i>Greater Boston Synagogue Organizing Project</i>	<ul style="list-style-type: none"> <li>• Engaged the Jewish community in systemic social justice work and built vibrant, high functioning institutions, organized around and acting upon shared interests and common values.</li> </ul>
<b>Jewish Funds for Justice, Inc.</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> </ul>	<i>Congregation Based Community Organizing and Seminary Leadership Programs</i>	<ul style="list-style-type: none"> <li>• Made public action, leadership development, and civic engagement a priority in the religious culture of American Jewish life.</li> </ul>
<b>Jews United for Justice (PAG)</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Mobilized Washington-area Jews to act on shared Jewish values by pursuing justice and equality in the region.</li> </ul>
<b>Junebug Productions</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>The Free Southern Theater Institute</i>	<ul style="list-style-type: none"> <li>• Supported an educational program and community-centered cultural laboratory for the creation of new work based on real life experiences, and disseminated tools for using theater to affect social change, empower the oppressed and create public value.</li> </ul>
<b>League of Young Voters Education Fund</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Citizen Engagement Laboratory</i>	<ul style="list-style-type: none"> <li>• Supported an organization that developed digital media and technology that amplified the voices of under-served groups, particularly communities of color and young people.</li> </ul>
<b>Liberty Hill Foundation</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>Promoting Environmental Justice &amp; Sustainability in LA</i>	<ul style="list-style-type: none"> <li>• Supported a movement for social, economic, and environmental justice that advanced innovative environmental policies in Los Angeles, while setting precedents for the nation.</li> </ul>

<b>Los Angeles Alliance for a New Economy</b> <ul style="list-style-type: none"> <li>• Health</li> <li>• Ecological Innovation</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Addressed the needs of Los Angeles workers and their families through initiatives that produced both a healthier environment and good jobs.</li> </ul>
<b>New Israel Fund</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> <li>• Ecological Innovation</li> </ul>	<i>Women and the Environment: Agents of Change in Israel</i>	<ul style="list-style-type: none"> <li>• Supported an initiative to create a more vibrant, just, and peaceful Israel through supporting women as agents of change, developing an environmental movement, and seizing opportunity to create cross-sector social change.</li> </ul>
<b>New York Foundation for the Arts, Inc.</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>The Active Citizen Project</i>	<ul style="list-style-type: none"> <li>• Supported a laboratory for broad-based public activism that used art and new media as tools for social change.</li> </ul>
<b>Partnership for Working Families</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported an organization which worked to shift decision-making at the local, state, and federal levels so that the goals of economic development include the achievement of a healthy environment, quality jobs, affordable housing, and shared prosperity.</li> </ul>
<b>Pratt Institute for Community Development (PAG)</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Initiative for Arts &amp; Community Change</i>	<ul style="list-style-type: none"> <li>• Supported a project that connected arts, culture, and equitable development to strengthen low-income neighborhoods and make systemic change.</li> </ul>
<b>Progressive Jewish Alliance</b> <ul style="list-style-type: none"> <li>• Jewish Life and Values</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported education, advocacy and organizing efforts in the Jewish community and California on issues of economic justice, civil rights, and mutual understanding between Muslims and Jews.</li> </ul>
<b>Proteus Fund, Inc.</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Media Democracy Fund</i>	<ul style="list-style-type: none"> <li>• Supported efforts that increased philanthropic investments in media policy and media justice</li> </ul>
<b>Public Design Studio</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> <li>• Ecological Innovation</li> </ul>	<i>The 1% Program: Strengthening NonProfits Through Design</i>	<ul style="list-style-type: none"> <li>• Supported an initiative that strengthened communities through design and institutionalized pro-bono service in the architecture and design professions.</li> </ul>

<b>The Regents of the University of California at Los Angeles</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> </ul>	<i>UCLA Center for Labor Research and Education</i>	<ul style="list-style-type: none"> <li>• Supported a project to combat climate change and create high-wage green jobs in Los Angeles.</li> </ul>
<b>Rockefeller Philanthropy Advisors, Inc.</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>Breakthrough: Expanding the Breakthrough</i>	<ul style="list-style-type: none"> <li>• Supported a project that will continue to provide critical analysis and policy development, using the Breakthrough model of energy and climate work.</li> </ul>
<b>The Scribe Video Center, Inc.</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Documentary History Project for Youth: Precious Places; Community Radio Station</i>	<ul style="list-style-type: none"> <li>• Supported two projects: one where young producers created media focusing on social, political and cultural history, and a second project where community groups created short videos that are concerned with community issues.</li> </ul>
<b>ShoreBank Enterprise Group</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> </ul>	<i>Cleveland's Evergreen Cooperative Initiative</i>	<ul style="list-style-type: none"> <li>• Supported a project that produced tangible wealth creation for Cleveland's low-income neighborhoods, and developed a new model/approach to inclusive economic development that could have national impact.</li> </ul>
<b>State Voices</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Arts &amp; Democracy Project</i>	<ul style="list-style-type: none"> <li>• Supported and linked artists, cultural workers, activists, organizers and policymakers around issues of common concern.</li> </ul>
<b>Strategic Concepts in Organizing and Policy Education</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> <li>• Health</li> </ul>	<i>California Alliance 2012 Tax &amp; Fiscal Reform</i>	<ul style="list-style-type: none"> <li>• Developed multi-dimensional approaches that reduced and eliminated structural barriers to social, environmental and economic opportunities for disadvantaged communities.</li> </ul>
<b>Teachers College, Columbia University</b> <ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> </ul>	<i>Information on Artists IV: Aging Performing Artists</i>	<ul style="list-style-type: none"> <li>• Supported a project that assessed work, retirement and quality of life issues of aging artists.</li> </ul>
<b>Tides Center (PAG)</b> <ul style="list-style-type: none"> <li>• Ecological Innovation</li> </ul>	<i>Apollo Alliance</i>	<ul style="list-style-type: none"> <li>• Supported a coalition of labor, business, environmental and community leaders to catalyze a clean energy revolution that will put millions of Americans to work in a new generation of high quality, green collar jobs.</li> </ul>

<b>Union for Reform Judaism</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Religious Action Center of Reform Judaism</i>	<ul style="list-style-type: none"> <li>• Supported social justice advocacy and education work.</li> </ul>
<b>University of Wisconsin, Madison</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Center for State Innovation</i>	<ul style="list-style-type: none"> <li>• Provided government officials with access to the technical expertise and other tools necessary to develop, refine, and implement high-quality, innovative and sustainable policies in important areas of state concern, including health, the environment, economic development, public safety, and transportation.</li> </ul>
<b>Western Organization of Resource Councils Education Project</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> <li>• <b>Health</b></li> </ul>	<i>Responsible Energy Development Program</i>	<ul style="list-style-type: none"> <li>• Built organizing capacity to combat climate change by promoting responsible energy development and local alternatives to fossil fuels.</li> </ul>
<b>Working Partnerships USA</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> <li>• <b>Ecological Innovation</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported an organization that addressed the needs of working families in Silicon Valley through initiatives that expanded access to quality health care and a healthy environment, creating models that can and have been replicated elsewhere.</li> </ul>
<b>Yeshiva University</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Public Patent Foundation</i>	<ul style="list-style-type: none"> <li>• For a project that challenged patents that blocked equitable access to critical health care information and technologies.</li> </ul>

**Table II – Strategic Opportunities Created by the Current Economic and Political Context**

<b>Organization/Collaborators</b>	<b>Project Name</b>	<b>Collaborative Initiatives Relevance</b>
<b>American Jewish Joint Distribution Committee, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Inter-Agency Task Force on Israeli Arab Issues</i>	<ul style="list-style-type: none"> <li>• Supported a task force that generated awareness among North American Jews and the Israeli public to advance civic equality in Israel and the ability of Palestinian Israelis to contribute, participate, and benefit as full citizens.</li> </ul>

<b>Americans for Peace Now, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported an organization that strove to educate the American Jewish community and general public about the strategic and economic benefits of peace between Israel and her neighbors.</li> </ul>
<b>Brit Tzedek v'Shalom Jewish Alliance for Justice and Peace (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported an organization that engaged in advocacy, outreach to synagogues and Jewish Organizations, media relations, and community education initiatives to build a grassroots Jewish movement that advocated for greater U.S. commitment to resolving the Israeli-Palestinian conflict.</li> </ul>
<b>Center for American Progress</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Seizing the Energy Opportunity</i>	<ul style="list-style-type: none"> <li>• For a project that aimed to create a low-carbon future that can serve as an organizing principle to revitalize the economy, address energy insecurity, reduce global warming pollution, and tackle global poverty exacerbated by the energy crisis.</li> </ul>
<b>Center for Rural Affairs</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Creating a Rural Constituency for Health Care Reform</i>	<ul style="list-style-type: none"> <li>• Supported a project that broadened and deepened rural engagement in the public policy debate over ensuring access to high quality, affordable health care for all.</li> </ul>
<b>Center for Rural Affairs (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Seizing the Moment: Building Critical Coalitions &amp; Rural Support for Health Reform</i>	<ul style="list-style-type: none"> <li>• Broadened and deepened rural engagement in Montana and Nebraska in the public policy debate over ensuring access to high quality, affordable health care for all.</li> </ul>
<b>Center On Budget And Policy Priorities</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Strengthening Health Insurance Coverage</i>	<ul style="list-style-type: none"> <li>• Provided the technical expertise, research, and communications capacity necessary to assure informed citizen participation in debates on federal and state policies affecting access to health care.</li> </ul>

<b>Community Catalyst</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported a national nonprofit advocacy organization that worked to build the consumer and community leadership required to transform the American healthcare system.</li> </ul>
<b>Demos: A Network for Ideas and Action, Ltd. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Effective Regulation for the 21<sup>st</sup> Century</i>	<ul style="list-style-type: none"> <li>• Supported a project that raised political awareness of the need for sensible and pragmatic regulation in the U.S., and paved the way for responsible regulatory policy moving forward.</li> </ul>
<b>Demos: A Network for Ideas and Action, Ltd.</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Small Business Majority</i>	<ul style="list-style-type: none"> <li>• Built a national small business voice in support of comprehensive healthcare reform</li> </ul>
<b>Educational Broadcasting Corporation</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> <li>• <b>Arts &amp; Culture</b></li> <li>• <b>Health</b></li> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>NOW on PBS</i>	<ul style="list-style-type: none"> <li>• Supported a weekly investigative journalism series that focused on current issues about the environment, health, arts and culture, faith and the economy.</li> </ul>
<b>Enterprise Community Partners, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Emerald Cities Collaborative</i>	<ul style="list-style-type: none"> <li>• Supported a series of planned, scaled, equitable, economically sustainable “new energy” development projects beginning with energy efficiency retrofits of residential buildings.</li> </ul>
<b>FJC</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>ENCOUNTER</i>	<ul style="list-style-type: none"> <li>• Supported an educational organization dedicated to providing Jewish Diaspora leaders from across the religious and political spectrum with an exposure to Palestinian life.</li> </ul>
<b>Friends of the Earth (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Plan B: A no-regrets approach to climate policy</i>	<ul style="list-style-type: none"> <li>• Supported an initiative that sought to fundamentally redirect climate policy by providing more space for progressive solutions.</li> </ul>
<b>Global Philanthropy Partnership</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Chicago Climate Action Plan</i>	<ul style="list-style-type: none"> <li>• Supported a detailed plan for reducing greenhouse gas emissions from buildings, including residential retrofits of almost half of Chicago housing.</li> </ul>



<b>Herndon Alliance (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported a national coalition of nearly 200 minority, faith, advocacy, business, labor, and provider organizations that worked on the state and national levels to ensure guaranteed, affordable health care for all.</li> </ul>
<b>Israel Policy Forum (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Supported an organization that worked to provide reasonable, sustainable, and forward thinking solutions to a two-state resolution of the Israeli-Palestinian conflict to policymakers and the American Jewish community.</li> </ul>
<b>J Street Education Fund, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Inaugural Conference</i>	<ul style="list-style-type: none"> <li>• Supported a conference that demonstrated a strong pro-peace, pro-Israel presence, provide a sense of community and of a movement that believes in a two-state solution, and provided training and skills to participants to be effective pro-peace, pro-Israel emissaries in their own communities.</li> </ul>
<b>J Street Education Fund, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>J Street U Program</i>	<ul style="list-style-type: none"> <li>• Provided students on campus with opportunities for engagement toward a pro-peace solution in the Israeli/Palestinian conflict and an alternative to extremist politics currently dominating student campus groups working on this issue.</li> </ul>
<b>Just Vision, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Jewish Life and Values</b></li> <li>• <b>Arts &amp; Culture</b></li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>• Raised awareness among North American audiences about the range of grassroots Palestinian and Israeli peace building efforts.</li> </ul>
<b>National Priorities Project, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> <li>• <b>Ecological Innovation</b></li> </ul>	<i>The NPP Data 2.0 Project</i>	<ul style="list-style-type: none"> <li>• Upgraded and expanded a unique database of federal budget and spending information, state and local indicators data, and other data easily accessible nowhere else.</li> </ul>

<b>National Women's Law Center</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Women and Health Reform Project</i>	<ul style="list-style-type: none"> <li>• Supported a project that strengthened the voice of women in national policy debates over ensuring access to high quality and affordable health care for all, and worked with allies to secure the most equitable and sustainable sources of financing necessary to accomplish that goal.</li> </ul>
<b>New America Foundation</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> </ul>	<i>Roadmap to Health Reform</i>	<ul style="list-style-type: none"> <li>• Supported a project that advanced the national discussion about how best to achieve comprehensive health reform that will provide high quality and affordable care in an efficient, sustainable system.</li> </ul>
<b>Pacific Institute for Community Organizations</b> <ul style="list-style-type: none"> <li>• <b>Health</b></li> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Cover All Families Campaign</i>	<ul style="list-style-type: none"> <li>• Supported a campaign to build a strong, educated, faith constituency for a health care system that covers everyone, is affordable to families, and is fiscally sustainable.</li> </ul>
<b>Public Health Institute, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Good Jobs, Green Jobs Conference</i>	<ul style="list-style-type: none"> <li>• Supported a second national conference that brought together 2,000 participants and speakers to share strategies for realizing the economic potential of investing in environmental solutions.</li> </ul>
<b>Public Interest Projects, Inc. (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> <li>• <b>Health</b></li> </ul>	<i>Americans for Financial Reform</i>	<ul style="list-style-type: none"> <li>• Supported a coalition of nearly 200 national, state and local consumer, labor, retiree, investor, community and civil rights organizations that worked together to educate the public on the need for reform of the financial system. The financial crisis required an investment of government resources that diverted resources away from other pressing issues of our time, such as global warming, the environment and healthcare.</li> </ul>

<b>University of Maryland Foundation, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Gar Alperovitz-Book Project</i>	<ul style="list-style-type: none"> <li>• Supported a book that can serve as one element in an effort to stimulate a new dialogue-leading-to-action that moves beyond the constraints of current politics and policy.</li> </ul>
<b>Western Organization of Resource Councils Education Project</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> <li>• <b>Health</b></li> </ul>	<i>Responsible Energy Development Program</i>	<ul style="list-style-type: none"> <li>• Built organizing capacity to combat climate change by promoting responsible energy development and local alternatives to fossil fuels.</li> </ul>
<b>WGBH Educational Foundation</b> <ul style="list-style-type: none"> <li>• <b>Arts &amp; Culture</b></li> <li>• <b>Ecological Innovation</b></li> <li>• <b>Health</b></li> <li>• <b>Jewish Life and Values</b></li> </ul>	<i>Frontline/“Breaking the Bank”</i>	<ul style="list-style-type: none"> <li>• Supported a program that investigated the causes of the economic crisis, how the government has responded to it, and the need for fiscal reform.</li> </ul>
<b>WGBH Educational Foundation (PAG)</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>FRONTLINE/ World Carbon Watch</i>	<ul style="list-style-type: none"> <li>• Supported an investigative collaboration that took an in-depth look at the often hidden interests behind the proposed solutions to the climate change crisis.</li> </ul>

**Table III - Shareholder Activities**

<b>Organization/Collaborators</b>	<b>Project Name</b>	<b>Collaborative Initiatives Relevance</b>
<b>Center for Political Accountability</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Climate Change Initiative</i>	<ul style="list-style-type: none"> <li>• Emphasized climate change as a critical issue that directors need to pay particular attention to in scrutinizing their company’s direct and indirect political spending activity.</li> </ul>
<b>Ceres, Inc.</b> <ul style="list-style-type: none"> <li>• <b>Ecological Innovation</b></li> </ul>	<i>Ceres’ Investor Strategy on Climate Change</i>	<ul style="list-style-type: none"> <li>• Supported an initiative that harnessed the power of many of the nation’s largest investors to move companies, Wall Street, and policy makers to take bold action to address global warming.</li> </ul>

<b>Foundation for the Global Compact</b>	<i>Principles for Responsible Investing</i>	<ul style="list-style-type: none"> <li>Supported the United Nations Principles for Responsible Investment (PRI), a framework for investment professionals on environmental, social and corporate governance issues that can affect the performance of investment portfolios.</li> </ul>
<b>Interfaith Center on Corporate Responsibility</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported a coalition of primarily faith-based institutional investors that sought to build a more just and sustainable society by integrating social values into corporate and investor decisions.</li> </ul>

**Table IV - Gulf Coast/Katrina-Related Grants**

<b>Organization/Collaborators</b>	<b>Project Name</b>	<b>Collaborative Initiatives Relevance</b>
<b>Institute for Sustainable Communities (PAG)</b> <ul style="list-style-type: none"> <li>Health</li> <li>Ecological Innovation</li> </ul>	<i>Gulf Coast Community Renewal Project</i>	<ul style="list-style-type: none"> <li>For continued work in the Gulf Coast region that supported the development of environmentally sustainable and healthier communities in the aftermath of Hurricane Katrina.</li> </ul>
<b>National Performance Network, Inc.</b> <ul style="list-style-type: none"> <li>Arts &amp; Culture</li> </ul>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization headquartered in New Orleans that integrated the arts into public experience, furthered artistic pluralism and acted as an advocate for cultural equity and social justice by supporting artistic activities that demonstrate these values.</li> </ul>
<b>Young People's Project, Inc.</b> <ul style="list-style-type: none"> <li>Arts &amp; Culture</li> </ul>	<i>Finding Our Folk</i>	<ul style="list-style-type: none"> <li>For a project that documented and shared the stories of Katrina survivors and connected these stories with the narratives of other marginalized individuals.</li> </ul>

**Table V – Affinity and Organizational Membership Grants**

<b>Organization</b>	<b>Project Name</b>	<b>Collaborative Initiatives Relevance</b>
<b>Asian American-Pacific Islanders in Philanthropy (PAG)</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported a national membership and philanthropic advocacy organization dedicated to advancing philanthropy and Asian American/Pacific Islander (AAPI) communities. Since 1990, AAPIP has expanded its programs to support the work of Asian Americans/Pacific Islanders in philanthropy, encourage Asian American/Pacific Islander giving, become a resource for donors and communities, and served as an incubator of new ideas and approaches for social justice philanthropy.</li> </ul>
<b>Association of Black Foundation Executives, Inc.</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization whose mission is to promote effective and responsive philanthropy in Black communities. ABFE's members and supporters are catalysts for advancing philanthropic practices that build on a tradition of self-help, empowerment, and excellence to solve the challenges faced in Black communities.</li> </ul>
<b>Center for Lobbying in the Public Interest</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that promotes, supports, and protects nonprofit advocacy in order to advance the mission of charitable organizations and strengthen participation in our democratic society.</li> </ul>
<b>Council on Foundations, Inc.,</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that provides the opportunity, leadership and tools needed by philanthropic organizations to expand, enhance and sustain their ability to advance the common good.</li> </ul>

<b>Disability Funders Network (PAG)</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported the only national organization that works to promote inclusion, disability awareness among grantmakers, and the inclusion of people with disabilities as integral members of diverse foundation staffs and boards. The Disability Funders Network fills an important niche in the community of organizations that advocate for the human and civil rights and socio-economic participation of people with disabilities.</li> </ul>
<b>First Nations Development Institute</b>	<i>Strengthening Native American Philanthropy</i>	<ul style="list-style-type: none"> <li>Supported a project that works to restore Native American control and culturally-compatible stewardship of the assets they own (e.g., land, human potential, cultural heritage, or natural resources) and established new assets for ensuring the long-term vitality of Native communities.</li> </ul>
<b>Foundation Center</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that strengthens the nonprofit sector by advancing knowledge about U.S. philanthropy. The Foundation Center collects, organizes, and communicates information on U.S. philanthropy, provides education and training on the grantseeking process, conducts and facilitates research on trends in the field, and ensures public access to information and services through its five library learning centers, its growing network of Cooperating Collections, its content-rich web site, and its print and electronic publications.</li> </ul>

<b>Hispanics in Philanthropy</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that strengthens Latino communities by increasing resources for the Latino and Latin American civil sector; increases participation and leadership throughout the field of philanthropy; and fosters policy change to enhance equity and inclusiveness.</li> </ul>
<b>Independent Sector</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that serves as the leadership forum for charities, foundations, and corporate giving programs committed to advancing the common good in America and around the world.</li> </ul>
<b>National Center for Family Philanthropy, Inc.</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported the only nonprofit resource center dedicated exclusively to giving families and those who work with them.</li> </ul>
<b>National Committee for Responsive Philanthropy</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that seeks to promote philanthropy that serves the public good, is responsive to people and communities with the least wealth and opportunity, and is held accountable to the highest standards of integrity and openness. NCRP is the only independent watchdog of foundations, and they blend research, advocacy, and communications into a programmatic agenda that helps philanthropy better serve public purposes and the needs of marginalized communities.</li> </ul>
<b>Native Americans in Philanthropy (PAG)</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization whose mission advances philanthropic practices grounded in Native values and traditions. Major activities include leadership development, an annual conference, and education.</li> </ul>

<b>New York Regional Association of Grantmakers, Inc.</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported a nonprofit membership organization created by the New York philanthropic sector to support the practice of philanthropy in this region. NYRAG strengthens philanthropy by offering programs and resources that support effective, strategic grantmaking; facilitated collaboration and knowledge sharing; and communicated the value of the philanthropic sector in our society.</li> </ul>
<b>Nonprofit Coordinating Committee of New York, Inc.</b>	<i>General Support</i>	<ul style="list-style-type: none"> <li>Supported an organization that informs and connects New York nonprofit leaders, saves nonprofits money by spearheading collaborative purchasing efforts, and strengthens the nonprofit sector's relations with the government. NPCC serves as the voice and information source for New York nonprofits.</li> </ul>



# Shareholder Activities Program

## 2009

*“In my view, shareholder activism is not a privilege – it is a right and responsibility. When we invest in a company, we own part of the company and we are partly responsible for how that company progresses.”*  
*Mark Mobius, Executive Chairman, Templeton Asset Management Ltd.*

### INTRODUCTION

The Foundation’s shareholder activities work seeks to use the Foundation’s status as an institutional investor to enhance long-term shareholder value while furthering both overarching and program-specific objectives such as accountability, transparency, access to healthcare and the protection of the environment.

The Foundation’s activities have increased substantially in terms of both scope and impact since the passage of NCF’s Shareholder Activity Guidelines in 2002. Over the last eight years we have been able to:

- File more than 65 shareholder resolutions across an array of topics and industries. In 2009, the Foundation filed or co-filed 17 shareholder resolutions, making 2009 the most active year ever for NCF in terms of shareholder filings.
- Actively cast votes on management and shareholder proposed resolutions covering environmental, social and governance (ESG) issues on thousands of proxies. In 2009, NCF cast more than 6,000 votes on 562 proxies. Our proxy voting guidelines are frequently requested by other investors looking to implement or improve their own guidelines and, in 2009, the Foundation received numerous requests to participate in conferences and educational webinars focusing on proxy voting.
- Forge ongoing working relationships with several major corporations, holding periodic meetings with companies to discuss a range of environmental, social and governance issues including climate change, political contributions and executive compensation.
- Establish the Foundation as a leader in the area of responsible investing and shareholder activism in the foundation world and among institutional investors in general. Recent coverage of our work has appeared in publications including the *Seattle Times* and the *Financial Times* and on the *Marketplace Morning Report*.

The following describes in more detail the shareholder activities undertaken by the Foundation during 2009, including collaborative efforts, shareholder resolutions and proxy voting.

### **Highlights of the 2009 Shareholder Season**

During the 2009 proxy season, the Nathan Cummings Foundation built upon its past successes while expanding into new focus areas. 2009 marked the seventh full year since the approval of the Foundation's Shareholder Activity Guidelines in the spring of 2002, and was a year of significant accomplishments for the Foundation's shareholder activities work. Once again, the Foundation's resolutions gained consistently high levels of investor support and sparked interest from both the press and a broad array of organizations wishing to learn more about NCF's approach to active ownership.

In 2009, the Foundation was able to:

- Achieve a record number of agreements leading to the withdrawal of its shareholder proposals. Agreements were reached with Pulte Homes and Albemarle Corporation, a manufacturer of complex chemicals, on climate change and disclosure of product defense spending, respectively. A say on pay resolution was also withdrawn from Wells Fargo after its participation in the Troubled Asset Relief Program made it mandatory for the company to give investors a say on pay.
- Use our shareholder resolutions to push companies to take concrete action on climate change. Following more than a year of engagement led by NCF, Pulte Homes took a number of steps to address climate change, including becoming the first publicly traded homebuilder to join the Environmental Protection Agency's Climate Leaders program. Under the program, Pulte is required to commit to reducing its greenhouse gas (GHG) emissions, set long-term reduction targets and report on its progress on an annual basis.
- Expand our focus to include compensation-related governance issues. During 2009, NCF took the lead on 4 compensation proposals. In a related development, a say on pay resolution co-filed by the Foundation and the American Federation of State, County and Municipal Employees (AFSCME) at Apple in both 2008 and 2009 led the company to agree to provide investors with a say on pay.
- Maintain a high level of support for our proposals from both RiskMetrics and PROXY Governance, with RiskMetrics supporting an impressive 91% of NCF resolutions proceeding to a vote in 2009. We also saw several of our resolutions supported for the first time ever by the relatively conservative Glass Lewis & Co. This across-the-board support led to some impressive vote results, including votes on proposals relating to political contributions at McGraw-Hill (37% support) and Valero (47% support).
- Successfully construct all shareholder proposals to withstand corporate requests for no-action relief from the Securities and Exchange Commission (SEC). Once again, this was despite a relatively high level of omissions during the year. According to RiskMetrics, 67% of

corporate challenges through the end of March 2009 resulted in the SEC actually granting no-action relief to the company.<sup>1</sup>

- Single handedly persuade one of the Foundation's largest asset managers to rethink changes to its proxy voting policy. Following extensive discussions with the Foundation, the manager formally changed its policy to make its default position a vote in line with ISS (RiskMetrics) recommendations on virtually all proposals.
- Score within the top quartile of all United Nations Principles for Responsible Investment signatories on Principle 5 (working together to enhance effectiveness) despite our relatively small asset size. When compared to our peers falling into the smallest quartile in terms of assets under management, NCF ranked in the highest quartile for 4 of the 6 Principles.

### **Collaborations with Other Asset Owners**

#### **Carbon Disclosure Project (CDP)**

Since its inception in 2000, the Carbon Disclosure Project has expanded from a single yearly report with an exclusive focus on the FT 500 to include numerous reports covering companies across the globe. In the meantime, the response rate of companies in the FT 500 has increased from 52% in 2002 to 82% in 2009.<sup>2</sup> The response rate among S&P 500 companies now stands at 66%, a 20% increase in just two years. Through its questionnaire sent on behalf of more than 475 institutional investors with approximately \$55 trillion US in assets under management, the CDP has amassed the largest registry of corporate greenhouse gas (GHG) emissions data in the world.

The 2009 round of CDP reports was launched in New York on September 21, 2009. The Foundation's director of shareholder activities attended the launch on behalf of NCF, which is not only a signatory to the CDP, but also one of the collaboration's major funders. During 2009, NCF helped to increase the rate of response to the CDP through both corporate dialogues and the submission of shareholder proposals.

#### **Interfaith Center on Corporate Responsibility (ICCR)**

ICCR is a recognized leader in the corporate social responsibility movement and has a long track record of pressing corporations to be more environmentally and socially responsible. ICCR's core membership is comprised of religious organizations, with pension and labor funds and socially responsible investment firms playing a key role as associate members.

NCF first joined ICCR in 2002. We continued to serve as a key partner in ICCR's shareholder work during the 2009 season. The Foundation worked on shareholder resolutions asking corporations to adopt principles for healthcare reform, played a pivotal role in an ICCR-led tele-news conference announcing these resolutions and led the effort to garner support for them from the various proxy voting advisory services.

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<sup>1</sup> Due to the fact that the shareholder resolution-filing season begins in the fall of the preceding year, by the end of March, many no-action requests for the 2009 season have been filed by companies and decided upon by the SEC.

<sup>2</sup> The FT 500 covers the 500 largest corporations in the world.

### Investor Network on Climate Risk (INCR)

INCR is a roughly \$7 trillion network of institutional investors working to promote a better understanding of the financial risks and opportunities associated with climate change. The Nathan Cummings Foundation has been actively involved with the work of INCR since its inception in 2003.<sup>3</sup> The Foundation served as a co-convenor of both the 2005 and 2008 Investor Summits on Climate Risk and signed onto the 2005 and 2008 versions of the Climate Risk Action Plan.

In 2009, the Nathan Cummings Foundation took a number of actions in an effort to fulfill its commitment to the Climate Risk Action Plan. Examples include once again joining with other investors to call on the SEC to expand climate reporting requirements to include oil sands operations, acting with a broad coalition of investors to push the SEC to require corporations to disclose material risks relating to climate change, signing onto a global investor statement on the need for a global climate change agreement and filing shareholder proposals calling on corporations to reduce their GHG emissions.

### United Nations Principles For Responsible Investment (PRI)

The PRI is a global institutional investor initiative that grew out of a view that ESG issues can affect the performance of investment portfolios and that investors wishing to fulfill their fiduciary (or equivalent) duty need to give appropriate consideration to these issues. The PRI provides a framework for doing so.

As a founding member of the PRI, the Nathan Cummings Foundation signed onto the Principles at their public launch in April 2006. Assets under management represented by PRI signatories grew from slightly over \$4 trillion in 2006 to just over \$18 trillion at the beginning of 2009 while the number of signatories climbed from 50 to 500.

NCF was instrumental in the formation of the PRI and continues to play an active role today. NCF's director of shareholder activities served on the Steering Committee of the PRI Small Funds Initiative in 2009 and, at the request of PRI secretariat, attended the PRI Academic Conference to speak on the research needs of responsible investment practitioners. The Foundation also participated in a number of investor campaigns coordinated through the PRI's web-based clearinghouse during 2009.

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<sup>3</sup> INCR initially arose out of a high-level gathering held at Pocantico in January 2003. Lance represented NCF at this gathering of state and city treasurers, foundation presidents, corporate governance experts, labor leaders and corporate attorneys assembled to discuss the connection between climate change and long-term shareholder value.

### **Speaking Engagements – 2009**

NCF's President & CEO and the Foundation's director of shareholder activities spoke at a number of conferences and webinars focusing on proxy voting, shareholder activism and responsible investment. Speaking engagements undertaken during 2009 include:

- 3<sup>rd</sup> Annual Forum on Responsible Investing (January 12, 2009). NCF's President & CEO spoke on a panel entitled, "Sharing the Latest Innovative Approaches Towards Shareholder Engagement as a Responsible Investing Tool".
- Financial Times/JustMeans Sustainable Business, Responsible Investing Conference (March 2, 2009). The Foundation's director of shareholder activities participated in a panel discussion focusing on investing in green while maximizing investment returns.
- Environmental Grantmakers Association/Ceres Webinar – Assets for Climate Change (April 1, 2009). NCF's President & CEO spoke to other foundations about NCF's climate change related shareholder proposals and corporate dialogues.
- Ceres Conference 2009 (April 15, 2009). NCF's director of shareholder activities spoke on a panel entitled, "Real Solutions for Real Estate: Achieving Energy Efficiencies and Building Value".
- Integrating ESG into Portfolios: From Europe to the US (June 25, 2009). The Foundation's director of shareholder activities spoke on a panel exploring the latest trends in US/European corporate engagement.
- Confluence Philanthropy Meeting (May 26, 2009). The Foundation's director of shareholder activities provided an overview of the Foundation's approach to active ownership.
- Council of Institutional Investors Webinar – Sustainability 101 (July 30, 2009). The Foundation's director of shareholder activities spoke to members of the Council of Institutional Investors about NCF's shareholder activities and the concept of sustainability.
- PRI Academic Conference 2009 (October 2, 2009). NCF's director of shareholder activities participated in a panel discussion examining current research relating to responsible investment (RI) and new topics for future RI research.
- Proxy Access Roundtable (October 6 & 7, 2009). The Foundation's President & CEO participated in a roundtable on proxy access convened by the Program on Corporate Governance at Harvard University School of Law.
- The Harvard Law School Program on Corporate Governance (October 6, 2009). NCF's CEO lectured on proxy access and the reform of corporate elections.
- PRI Small Funds Webinar (October 20, 2009). The director of shareholder activities spoke about NCF's experience with proxy voting.

## 2009 Shareholder Resolutions

The Nathan Cummings Foundation filed 17 shareholder resolutions in 2009. The details of each filing are outlined in the table below.

Company	Resolution	Filers	Outcome
Albemarle	Lobbying Expenses/Toxics	NCF	The resolution was withdrawn. The company agreed to annual disclosure of total product defense spending. ALB will also provide qualitative guidance on how much of the spending related to different products and issues and provide commentary about its efforts to develop and commercialize new and improved flame retardants.
Apple	Say on Pay	AFSCME, NCF	The resolution received the support of 51.6% of shares voted. Apple has agreed to implement the proposal and provide shareholders with a say on pay.
ConocoPhillips	Political Contributions	NCF, Teamsters and others	The resolution received the support of 27.5% of shares voted.
Exxon Mobil	Climate Change – Emission Reductions	Tri-Cri, NCF and others	The resolution received the support of 29% of shares voted.
Lennar	Climate Change – Emission Reductions	NCF	The resolution received 9.8% of the vote. The company has dual classes of stock with the CEO controlling about 48.7% of the combined classes at the time of the meeting. This accounts for the relatively low vote despite support for the proposal from RiskMetrics.
McGraw-Hill	Political Contributions	NCF	The resolution received the support of 37.1% of shares voted. McGraw-Hill agreed to provide annual board oversight of its political contributions and to disclose information about its trade association memberships and list the politically-driven tax exempt organizations to which it contributes.

McKesson	Equity Compensation – Hold Till Retirement	NCF	The resolution received the support of 30.6% of shares voted.
Oracle	Equity Compensation – Hold Till Retirement	NCF	The resolution received the support of 20.6% of shares voted.
Pulte Homes	Climate Change – Emission Reductions	NCF, Domini	The resolution was withdrawn. Pulte agreed to include information on the energy efficiency of the homes it builds, as well as a discussion of strategies to increase the number of homes it builds above code, in its annual report. The company also agreed to answer the Carbon Disclosure Project Questionnaire. Pulte joined the Environmental Protection Agency’s Climate Leaders Program and is establishing operational GHG emission reduction goals.
The Ryland Group	Climate Change – Emission Reductions	NCF	The resolution received the support of 29.9% of shares voted.
Standard Pacific	Climate Change – Emission Reductions	NCF, UMC – General Board of Pension and Health Benefits	The resolution received the support of 15.3% of shares voted.
Ultra Petroleum	Climate Change	NCF	The vote did not count due to a technicality.
UnitedHealth Group	Say on Pay	NCF and others	The resolution received the support of 40.7% of shares voted.
Valero Energy	Political Contributions	NCF, Catholic Healthcare West, Socially Responsible Investment Coalition	The resolution received the support of 47.4% of shares voted. Following the vote, the company took steps to address the issues raised in the proposal, including providing information on its policies governing contributions and disclosing its political contributions on a semi-annual basis.

Wal-Mart	Say on Pay	Amalgamated Bank, NCF	The resolution received the support of 18.5% of shares voted.
Wells Fargo	Say on Pay	NCF	The resolution was withdrawn. As a recipient of TARP funds, the company was required to give investors a say on pay.
Yum! Brands	Healthcare Principles	NCF, Trinity Health and others	The resolution received the support of 6.2% of shares voted.